



MANAGERS FOR LOCAL GOVERNMENT

a study

The Discussion Papers
#5: Education/Training/Development



DEPOSITORY LIBRARY MATERIAL

ASB

advisory services branch

CA2φN
TR 36
- 77D05

Ministry of Treasury,
Economics and
Intergovernmental
Affairs

300 Ministry of Treasury, Economics and Intergovernmental Affairs publication

MANAGERS
FOR
LOCAL
GOVERNMENT
A Study

THE DISCUSSION PAPERS

V. EDUCATION
TRAINING
DEVELOPMENT

Advisory Services Branch
Ministry of Treasury,
Economics and Inter-
governmental Affairs
6th Floor
56 Wellesley Street West
Toronto, Ontario
M7A 1Y7

Spring 1977

In January of 1976 this Branch launched a study titled Managers for Local Government, the objective of which is to predict the qualitative and quantitative requirements for local-government managers over the next ten years, and to recommend methods by which needs can be met.

A questionnaire was sent to all municipal clerks, treasurers, chief administrative officers and personnel officers. The responses were compiled and analysed in a report titled "The Data Base", released in June of 1976. A similar questionnaire to council members has been analysed, and comparisons have been drawn with the analysis of the questionnaires to appointed officials. The questionnaires were backed by interviews in nearly 100 municipalities.

Using primarily those sources of data and opinions, this paper has been produced as the last in a series of five papers. The topics of the papers are:

- Manpower Planning,
- Career Planning,
- Organization and the Management Focus,
- Recruitment,
- Education/Training/Development,
- A Summary of Issues for Action.

These papers will be discussed with municipal associations, professional groups, individual municipal staff members and councillors, educators and opinion leaders.

A second series of papers, with more definitive recommendations, will follow. Discussions resulting from these papers will lead to the final report, which is planned for late summer, 1977.

E.A. Gomme
Director
Advisory Services Branch

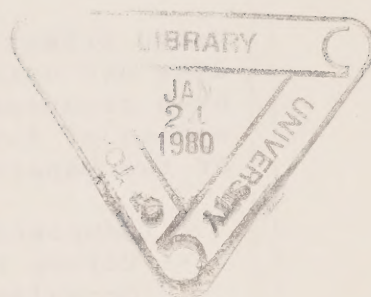


TABLE OF CONTENTS

	<u>Page</u>
INTRODUCTION	(i)
PART ONE	
Attitudes Toward Education/Training/ Development	1
Official Policy	1
Councillors' Attitudes	3
Usefulness of Education	4
Resources in Use	6
Education Predictions	7
Costs of Education	9
Inter-Municipal Training	10
PART TWO	
Existing Educational/Training Offerings	11
Desirable Components of Courses	13
Course Offerings at Colleges	15
Course Offerings at Universities	16
Desirable Course Offerings	17
Special Learning Programs	21
Programs Associated with A.M.C.T.O.	21
University Courses and Programs	29
Provincial Resources	32
Observations	34
PART THREE	
The Approach	36
The Four Dimensions of Management	38
Elements of Local-Government Management	40
The Five Elements of Management	41
Management Skills	43
Political Awareness	46
Communicative Ability	48
Mental Energy	49
Technical Skills	50
Future Resources for Education/Training/ Development	52

PART FOUR

Methods of Co-ordinating Education/Training/ Development	55
The Canadian Experience	56
Quebec	56
British Columbia	58
Alberta: City of Calgary	60
The Maritimes	62
Developments in Ontario	65
The United States Experience	68
International City Managers Association ...	68
The Academy for Professional Development ..	69
The British Experience	77
Local Government Training Board	77
Local Authority Management Services and Computer Committee	79
Institute of Local Government	80
Other European Experiences	82

PART FIVE

What Needs to be Done?	85
------------------------------	----

APPENDIX A

Proposals for Local Government Management
Development in the Province of Ontario - A
Memorandum Prepared by the Advisory Committee
on Local Government Management

Digitized by the Internet Archive
in 2024 with funding from
University of Toronto

<https://archive.org/details/31761120600135>

INTRODUCTION

The objective of this study is to project the qualitative and quantitative requirements of municipalities in Ontario over the foreseeable future for competent staff in middle-management and upper-management positions, and to prepare recommendations on action and methods through which these requirements may be met.

This paper is the last in a series of five papers that examine the issues raised in the study. The purpose of these papers is to elicit discussion and develop proposals from the local-government community.

This fifth paper looks at education, training and development not as separate, or separable, solutions for preparing people for management positions, but as inter-dependent and cumulative parts of a common approach.

This study has shown that future managers in local government will come from a variety of sources. It has shown that there is an increasing demand for higher levels of education, but that the content of this education has not been identified; that experience is a major qualification, but that it is difficult for people to acquire experience outside a single department in a single municipality; and that there is overwhelming support for professional development activities, but little in the way of planned programs of professional development or organizations to oversee the programs.

(ii)

This paper will examine education, training, and development not only as they interact and complement each other, but as they relate to the various types of management positions in various types and sizes of municipalities. The approach will be multi-dimensional.

This paper will:

Part One

- *identify the attitudes toward education/training/development as expressed by both existing managers and council members.*

Part Two

- *discuss existing education/training/development activities;*
- *discuss activities termed "desirable" by local-government practitioners;*
- *identify the gaps between available activities and desirable activities.*

Part Three

- *discuss predictable requirements for education/training/development in the next ten years;*
- *discuss the likelihood of existing organizations being able to meet these requirements;*
- *identify gaps between predictable needs and predictable resources to meet these needs.*

Part Four

- *discuss education/training/development activities in other jurisdictions;*
- *discuss the types of organizations handling these activities;*

(iii)

- identify the elements of these activities or organizations that are applicable to the Ontario local-government situation;
- identify any gaps that would still exist.

Part Five

- draw conclusions, in summary form, as to the problems that will be encountered;
- draw conclusions, in summary form, as to the resources that will be necessary to meet these problems;
- list possible courses of action.

DEFINITIONS

For the purpose of this study, the following definitions will be used:

Manager

- one who is involved in the allocation and control of staff resources; the formulation of policy recommendations to council; and the administration of policies or programs.

Education

- the study of subjects or groups of subjects at or through a recognized post-secondary educational institution.

Training

- the study of techniques for the purpose of acquiring skills at or through a recognized educational institution, professional organization, association, or private source.

In-House Training

- the on-the-job study of techniques as they apply to a specific job or function, or to the objectives of a specific organization.

Development

- the growth that results when strategies and systems are adopted by the organization to foster achievement by the individual; and when attitudes and activities are adopted by individuals that contribute to the success of the organization.

PART ONE

ATTITUDES TOWARD EDUCATION/TRAINING/DEVELOPMENT

In the questionnaires that were sent to both senior municipal managers and council members, a series of questions relating to education/training/development were asked. Responses to these questions, backed by responses given during interviews, are included below. All percentages are based on the 515 managers and/or 526 council members who responded to the questionnaires. Percentages often total more than 100 because a respondent indicated more than one answer to specific questions.

OFFICIAL POLICY

What policy has been set by your council concerning the training and development of staff members? If council's policy is written out in by-law or resolution, please include a copy with your completed questionnaire. You may wish to indicate more than one response.

	<u>Managers</u>	<u>Council</u>
	<u>% of 515</u>	<u>Members</u>
	<u>% of 515</u>	<u>% of 526</u>
a) No policy.	a) - 46%	52%
b) Courses are encouraged.	b) - 47%	58%
c) Courses are required from time to time for salary increases or promotional purposes.	c) 4%	5%
d) Total incurred costs are paid by the municipality on completion of course.	d) - 27%	29%
e) The municipality pays part of the costs of the course.	e) - 15%	20%
f) Other. Please specify briefly.	f) 2%	2%
g) No response.	g) - 2%	2%

Do you have an annual budget for education, training, and development programs?

	<u>Managers</u>	<u>Council Members</u>
	<u>% of 515</u>	<u>% of 526</u>
a) Yes.	a) - 18%	21%
b) No.	b) - 79%	76%
c) No response.	c) - 3%	3%

Are education, training, and development programs for your municipal staff coordinated by:

	<u>Managers</u>
	<u>% of 515</u>
a) A single person or department?	a) - 15%
b) By each department head?	b) - 20%
c) Not coordinated?	c) - 55%
d) No response.	d) - 10%

On what basis are education, training, and development programs funded by your municipality?

	<u>Managers</u>
	<u>% of 515%</u>
a) Formal performance appraisal.	a) - 9%
b) Manpower planning schemes.	b) - 5%
c) Personal career development.	c) - 20%
d) First come, first served.	d) - 19%
e) No response.	e) - 39%

It must be noted that over half (55%) of the respondents indicated there is no co-ordination of education, training or development programs. This roughly reflects the 46% of respondents who indicated their council has not established policy in this area.

It is also notable that 79% of the respondents reported there is no annual budget for education, training, or development. Since the question shows that only 21% of the respondents have not been involved in some type of development activity in the last five years, municipalities are either providing funds for these activities from general accounts, or the staff members are paying costs themselves. Responses to the question shown on Page 9 indicate the latter is not generally true.

The responses point out the lack of direction now given by municipalities to developmental programs for staff.

COUNCILLORS' ATTITUDES

Do you consider that your staff members should be involved in courses or seminars to upgrade their skills?

- | | |
|---------|------------|
| a) Yes. | a) - 94.5% |
| b) No. | b) - 5.3% |

If your answer to the above question is "Yes", how would this best be carried out from the standpoint of your municipality? You may wish to indicate an answer in each of the areas below.

- | | |
|---|----------|
| a) Half day per week for 10-16 weeks for formal courses or seminars. | a) - 19% |
| b) Release for blocks of time from 1-5 days for formal courses or seminars. | b) - 45% |
| c) Release for blocks of time from 1-6 weeks for formal courses or seminars. | c) - 7% |
| d) Courses or seminars conducted in-house or in an adjacent municipality. | d) - 33% |
| e) Courses or seminars sponsored by neighbouring colleges or universities. | e) - 42% |
| f) Training sessions offered by provincial ministries or agencies in response to demand. | f) - 46% |
| g) Training sessions offered throughout the Province on matters of Province-wide concern. | g) - 34% |

USEFULNESS OF EDUCATION

Questionnaire results have shown that 75% of the managers surveyed have little or no college or university education.¹ Generally, those with higher levels of education appeared most frequently in re-organized upper-tier municipalities.

To determine a relationship between level of education and usefulness of that education to the job, the following questions were asked:

How useful was your educational background in preparing you for your present position?

- | | |
|------------------------------------|----------|
| a) It was highly useful. | a) - 55% |
| b) It was not specifically useful. | b) - 40% |
| c) It was not useful. | c) - 4% |
| d) No response. | d) - 1% |

The higher the level of education, the more the respondent felt it had been useful as preparation for municipal management. Those with secondary school or less were evenly split on whether their education had been highly useful or not specifically useful, while two-thirds of those with a university background reported their education was highly useful.

The usefulness of education also varies widely with the type of job held by the respondent. Among treasurers, 80% reported it as highly useful while percentages for other categories are: C.A.O.'s, 65%; clerk-treasurers, 57%; clerk-administrators, 50%; clerks, 45%; and personnel officers, 41%.

¹ See Managers for Local Government, Report No. 3: The Data Base, Advisory Services Branch, Ministry of Treasury, Economics and Intergovernmental Affairs, Toronto, 1976, pp. 16-17.

How useful was your educational background when you were making application for your present position?

a) It is a standard requirement.	a) - 25%
b) It was highly useful.	b) - 40%
c) It was not specifically useful.	c) - 30%
d) It was not useful.	d) - 4%
e) No response.	e) - 1%

These figures suggest strongly that either there is very little now in the way of a standard requirement for municipal management positions, or that incumbents do not hold these standard requirements.

In examining the usefulness of education in making application for a job, the higher the level of education attained by the respondent, the more useful this education was considered to be. Of those with university background, 70% said their education was useful, while 55% of the college graduates felt the same way. Only 36% of those with secondary school found their background useful in applying for their job.

Among treasurers, 50% reported their education as being highly useful, 30% reported it as a standard requirement (no doubt relating to such designations as C.A. and R.I.A.). C.A.O.'s were about evenly split between their educational background being highly useful and not specifically useful. Nearly half the personnel officers said their background was not specifically useful, with the other 55% splitting opinions between highly useful and standard requirement. Those performing the clerk's function said educational background was a standard requirement in about 25% of the cases (usually the A.M.C.T. designation); 36% found it to be highly useful and 33% found no specific usefulness.

While 65% found their education to be highly useful, or a standard requirement, in making application for their position, only 55% found that education was highly useful to them on the job. While 44% found their education not very useful on the job, only 34% found it not useful in making application for that job.

RESOURCES IN USE

What education, training, or development programs have you undertaken in the last five years? You may wish to indicate more than one response. NOTE: Course outlines would be most useful to this study and would be appreciated if sent with completed questionnaire.

a) No courses or programs.	a) - 28%
b) Regularly offered college courses.	b) - 6%
c) Regularly offered university courses.	c) - 8%
d) Courses offered by a professional body or association such as A.M.C.T., R.I.A., etc.	d) - 36%
e) Short courses or seminars.	e) - 47%
f) Other. Please specify briefly.	f) - 4%
g) No response.	g) - 3%

It is noteworthy that while 37% of the respondents had taken professional or association courses in the last five years, 28% had taken no education, training, or development programs. It is also noteworthy that 47% have attended seminars or short courses during the last five years.

The majority of those who reported no educational activity were from remote areas and small rural municipalities.

Educational activity drops off appreciably as retirement age approaches. The highest level of activity was found among those below the age of 35 and the lowest among those over 55.

Nearly all treasurers, personnel officers and clerk-administrators have taken some type of course in the last five years. Among treasurers, 50% reported professional courses and 40% attended seminars or short courses. Half the personnel officers attended seminars or short courses and 20% took university courses. Almost 40% of the clerk-administrators took some type of professional course and 45% were involved in seminars.

EDUCATION PREDICTIONS

To determine what types of education/training/development would be most suitable to the existing municipal managers, the following questions were asked.

What type of education, training, and development courses do you feel would assist you in meeting the present and future demands of your job? You may wish to indicate more than one response.

a) No additional courses.	a) - 5%
b) Regularly offered college courses.	b) - 10%
c) Regularly offered university courses.	c) - 12%
d) Courses offered by professional bodies or associations such as A.M.C.T., R.I.A., etc.	d) - 47%
e) Short courses or seminars.	e) - 76%
f) Other. Please specify briefly.	f) - 6%
g) No responses.	g) - 4%

There is overwhelming support for short courses and seminars (76%) and nearly half (47%) the respondents lean toward courses offered by professional bodies or associations.

While 95% feel courses would not be useful in meeting the present and future demands of their job, the question on Page 6 shows that 28% have not been involved in such courses in the past five years. The gap between those who see a need for courses and those taking courses is great.

This question was analyzed on the basis of jobs held by the respondent as well as age and educational background. No significant variations from the raw figures were found, with the exception of personnel officers who were much less inclined toward short courses and seminars.

If you intend to up-date or broaden your formal knowledge, how would you prefer, ideally, to do this? You may wish to indicate more than one response.

- | | |
|--|----------|
| a) Experts brought to the municipal buildings to conduct in-house training. | a) - 24% |
| b) In-house sessions arranged and conducted by management. | b) - 8% |
| c) Existing courses at colleges or universities. | c) - 17% |
| d) New courses at colleges or universities specifically designed for municipal managers. | d) - 33% |
| e) Specifically designed and coordinated courses offered throughout the Province. | e) - 55% |
| f) No response. | f) - 18% |

Over half the respondents suggested they would take specially designed courses offered throughout the Province. When the number who opted for specially designed courses at colleges and universities is added, the percentage climbs to 87%. It is also interesting to note that earlier in the questionnaire only 71 respondents opted for college or university courses as the best way to up-date their knowledge, compared to 172 who opted for the same source, but with the words "specially designed for municipal managers" added in this question. While there is substantial demand (24%) for courses brought to the municipal offices and for in-house training sessions (8%), the demand was greatest among C.A.O.'s and personnel officers. The demand among these job classifications was even greater in the areas with upper-tier governments.

If you intend to up-date or broaden your formal knowledge, what type of program would you prefer? You may wish to indicate more than one response.

- | | |
|--|----------|
| a) By correspondence. | a) - 35% |
| b) On a continuing basis (two to three hours per week, from six to twelve months). | b) - 38% |
| c) On a short-term, intensive basis (full time for one to six weeks). | c) - 32% |
| d) Other (Please specify briefly). | d) - 2% |
| e) No response. | e) - 10% |

No program emerges as the type that a clear majority of the respondents would prefer. Among those in upper-tier governments, courses on a continuing basis have an edge; while in the boroughs and area municipalities within upper-tier government areas, correspondence courses are preferred. There is also a clear preference for correspondence courses in rural southern areas and remote northern areas. Cities prefer courses on a continuing basis. C.A.O.'s prefer short term courses as do treasurers and personnel officers. Those in the clerk's function favour correspondence courses and courses on a continuing basis over short-term, intensive courses.

COSTS OF EDUCATION

Do you expect the costs of programs which you successfully complete to be paid for by the municipality?

- | | |
|-----------------|----------|
| a) Yes. | a) - 50% |
| b) No. | b) - 13% |
| c) Partially. | c) - 27% |
| d) No response. | d) - 11% |

It is immediately apparent that any involvement in educational activities will be predicated on at least some degree of funding by the employer. A full 50% expect the employer to assume all costs. This statistic becomes doubly interesting when compared to the earlier question where only 43% of the respondents indicated their municipality had any policy on the funding of such programs.

INTER-MUNICIPAL TRAINING

Since throughout the study it has become obvious that "municipal experience" is the greatest requirement in getting a job as a municipal manager, the questionnaire to managers included the following questions:

Would you be interested in participating in an organized program where municipal managers could transfer to other municipalities on a temporary basis?

a) Yes.	a) -	36%
b) No.	b) -	53%
c) With the following qualifications.	c) -	4%
d) No response.	d) -	8%

Would you consider such a transfer program as a useful tool in developing management skills?

a) Yes.	a) -	53%
b) No.	b) -	35%
c) With the following qualifications.	c) -	2%
d) No response.	d) -	11%

These questions were analyzed in tandem because of the direct relationship they bear to each other. Immediately noticeable is the fact that while 53% of the respondents probably would not be interested in an exchange program, the same percentage would consider it to be a useful method of developing managers. Examining the questionnaires on an individual basis it was found that by far the majority of those who felt an exchange program to be useful also said they would not be interested (i.e., participate) in one.

The groups opting for an exchange program most strongly were the smaller communities, treasurers and clerk-treasurers, those over 45 years of age, and those with secondary school education.

PART TWO

EXISTING EDUCATIONAL/TRAINING OFFERINGS

Education/training systems are based on the premise that there are different educational requirements for different types of jobs. Most systems go even further, recognizing that even with the same type of job the degree of learning in a particular subject area will vary both with the tastes of the individual and the demands of the specific job. All lawyers need a working knowledge of The Criminal Code, but those specializing in criminal law need more development in this subject than those specializing in, say, corporate law.

This applies to the field of municipal government, and to management within municipal government. No one could function properly as a municipal manager without a knowledge of budgets and the budgetary process, but those in the treasurers' and chief administrative officers' departments need more knowledge of budgets than, say, those in the legal department.

In order to examine what educational opportunities are available for municipal management it is necessary, first, to determine what types of courses or programs are beneficial to the field in general. It is necessary, then, to determine the degree to which these courses and programs are necessary in the various types of management jobs in the various types of municipalities.

Methodology

In the early stages of this study, questionnaires were sent to both managers and council members throughout the Province. Much of the pertinent information gathered through those questionnaires is included in the preceding part of this report.

Since it was impractical to ask for specific information in such a survey, the questionnaires were backed by interviews in over 100 municipalities. During these interviews, individual managers and council members were asked to comment on the type of educational courses they feel are desirable for both those entering and those already practicing municipal management. This same type of question was also asked of a number of academics.

Their comments were collected into a series of types of courses and these were in turn broken down into the desirable elements as reported by the local-government community.

The listing, which appears on Page 13, does not pretend to be a complete picture of educational offerings, or even of desirable offerings, but simply a reporting of those courses and elements of courses most often suggested by the local-government community. The charts, that appear on Pages 15 and 16, indicate at which colleges and universities these types of courses are now available.

DESIRABLE COMPONENTS OF COURSES

ACCOUNTING

Cost, managerial, financial and fund accounting in both the private and public sectors. A review of bookkeeping and statistics is desirable for those with little experience.

COMMUNICATIONS

Effective writing, speaking and listening; speed reading; report writing; conference and committee reporting.

DATA PROCESSING

Techniques of feeding information to the computer; manipulating data in the computer printouts. Instruction in one computer language is useful.

POLITICS AND GOVERNMENT

The position of municipal government in the Canadian structure; provincial and federal department structures; inter-governmental relations; comparative municipal government structures; internal decision-making; allocation of power within municipal government.

LAW

Court systems; civil procedures; law of contract; functions of administrative and judicial tribunals; statutes relating to local government.

LAND-USE PLANNING

Planning processes within the economic, social and political spheres; official plans and zoning; policy-making, research and decision-making.

URBAN STUDIES

History and development of cities in Canada and abroad; sociology of urban areas; urban analysis techniques.

CIVIL ENGINEERING/TECHNOLOGY

Technical, supervisory and managerial aspects of urban services, including roads, water and sewerage systems, transportation.

RECREATION

Administrative and organizational aspects of recreation; federal and provincial legislation and policy; financing and budgeting; problem solving; public relations; municipal structures and ad hoc bodies.

SOCIAL SERVICES

Administration of health; education and welfare services; federal and provincial legislation and policies; social service procedures and agencies.

GEOGRAPHY

Processes of human activity over space; environmental impact on man-made and natural areas.

ASSESSMENT/APPRaisal

History of assessment in Ontario; duties and responsibilities of assessors; role of assessment in provincial-municipal relations; assessment practices and procedures; assessment review procedure.

ECOLOGY/ENVIRONMENTAL STUDIES

Ecological systems; impact of urban development; resources management; environmental interrelationships.

PERSONNEL/LABOUR RELATIONS

Interviewing, selection, placement, training, salary administration, employee benefits, performance appraisal and job descriptions; labour unions, union-management relations; law and process of collective bargaining, conciliation and arbitration.

ADMINISTRATION/MANAGEMENT

Principles of management of personnel, materials and resources; organizational development and theory; staffing, controlling, scheduling; techniques such as management by objectives (MBO).

MUNICIPAL ADMINISTRATION

Department organization; function of council and head of council; council-administration relations; boards, committees, commissions and ad hoc bodies; duties and functions of statutory officers.

NOTE: Not all courses listed on the following pages contain all of the topics shown above as being desirable. Anyone using these listings as guide in selecting courses for his own development should examine each course in detail before registering to insure that personal criteria are met.

Page 15																
COLLEGES		COURSE OFFERINGS														
Algonquin		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Cambrian		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Canadore		X	X	X				X	X	X						
Centennial		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Conestoga		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Confederation		X	X	X				X	X	X	X	X	X	X	X	
Durham		X	X	X				X	X	X			X	X	X	
Fanshawe		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
George Brown		X	X	X				X				X				
Georgian		X	X	X	X	X	X	X	X	X			X	X	X	
Humber		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Lambton		X	X	X				X	X	X					X	
Loyalist		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Mohawk		X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Niagara		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Northern		X	X	X	X	X			X	X			X	X		
St. Clair		X*	X	X	X	X	X	X	X	X	X	X	X	X	X	
St. Lawrence		X	X	X				X	X	X		X	X	X	X	X
Sault		X	X	X	X	X	X	X	X	X			X	X	X	
Seneca		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Sheridan		X	X	X	X	X	X						X	X		
Sir Sanford Fleming		X	X	X	X	X*	X	X	X	X			X	X		

UNIVERSITIES	COURSE OFFERINGS														
	Accounting	Computer Science	Politics and Government	Law	Geography	Ecology/ Environment	Planning	Urban Studies	Civil Engineering	Recreation	Social Services	Personnel and Labour Relations	Administration/ Management	Municipal Administration	Public Finance
Brock	X	X	X*	X*	X	X	X	X				X	X		X
Carleton	X	X	X*	X*	X	X	X	X	X		X	X	X	X	X
Guelph	X	X	X*	X	X	X	X	X	X	X	X	X	X		X
Lakehead	X	X	X*	X	X	X	X		X		X	X	X		X
Laurentian	X	X	X*	X	X	X		X	X		X	X	X		X
McMaster	X	X	X	X	X	X	X	X	X		X	X	X		X
Ottawa (incomplete)	X		X	X	X			X		X			X		
Queen's	X	X	X*	X	X	X	X					X	X	X#	X
Toronto	X	X	X*	X	X	X	X	X	X		X	X	X		X
Trent	X	X	X	X	X	X	X	X			X				X
Waterloo	X	X	X*	X	X	X	X	X	X	X	X	X		X	X
Western Ontario	X	X	X*	X	X	X	X	X	X	X	X	X	X	X	X
Wilfrid Laurier	X	X	X*	X	X	X					X	X	X		X
Windsor	X	X	X*	X	X	X	X	X	X		X	X	X	X	X
York	X	X	X*	X	X	X		X			X		X		X
Ryerson Polytechnical Inst.	X	X	X*	X	X	X	X	X	X				X		X

* Indicates course with specifically municipal-oriented content.

DESIRABLE COURSE OFFERINGS

It would appear from the preceding chart that there is a rich educational resource available to local-government personnel and to those planning careers within local government. While the resource is evidently available, it is also clear from Part One of this paper that the resource is not being used.

At least part of the reason for this situation lies in the commentary that accompanies the question shown on Page 6, and where it became clear that few municipal managers intended to become involved in college or university courses. (Note that when the same people were asked if they would take college or university courses designed specifically for municipal management an appreciably larger number of positive responses were given).

When individual managers and council members were asked why they did not intend to undertake formal college or university programs, overwhelmingly the responses were lack of time, inability to identify specific courses as being totally relevant to their personal situation, and a "gut" feeling that existing college and university courses would be of little benefit to them.

Both managers and council members strongly stated that municipal government education is not a question of this course or that course, but of a package of courses or experiences. Attempts were made to have managers

identify the most appropriate courses for their type of job or type of municipality, and to estimate the level of achievement within the courses that would be best in their situation.

These attempts were not fruitful when it became clear that each individual had a different approach. Each placed more stress on the types of courses he had personally taken--accountants stressed accounting, data processing, and management, while planners stressed ecology, geography, and management.

To overcome this problem, it was necessary to move away from specific subjects and toward categories of learning and experience. To this end, the following categories were identified:

Management Skills

- an ability to foresee and forestall problems in the allocation and use of human and other resources, an ability to see the job from the perspective of the entire organization; an ability to translate problems and answers into quantitative terms, an understanding of one's role in planning, organizing, directing and controlling resources; skills in establishing objectives, and monitoring progress toward these objectives, the use of leadership styles consistent with the goals and climate of the organization; an ability to use scarce resources effectively and efficiently.

Political Awareness

- an understanding of the political system; an understanding of the position held by a person within the decision-making process; an ability to work within a bureaucratic structure; an ability to accept and administer decisions made by councils or superiors even if these decisions are not agreed to by the person; an ability to alter priorities according to social and environmental changes; an ability to assume a high profile or a low profile, as the situation demands.

Communicative Ability

- an ability to express one's self clearly and precisely in both speaking and writing; an ability to understand and respond to both written and oral communications.

Mental Energy

- an ability to examine problems and situations and to apply remedial measures in a way which will correct the deficiencies; an ability to understand and rationalize new techniques and procedures, and to apply those which will improve existing situations; an ability to think in both pragmatic and theoretical terms; a willingness to use untried but likely solutions to problems.

Technical Skills

- an ability to understand technical functions required by specific departments, such as bookkeeping or accounting, drafting or drawing; data processing or analysis; records processing or retention.

It is immediately recognizable that these five elements of local-government management do not readily equate to existing course offerings at colleges and universities. Parts of the desirable elements can be found in parts of the existing courses. In no case does an existing course closely match the desirable management elements.

It should be noted that some of the elements can be learned as easily on the job as in the classroom, and that political awareness is perhaps only acquired "in the arena", as one manager put it.

SPECIAL MUNICIPAL LEARNING PROGRAMS

Along with regular course offerings at colleges and universities, a number of learning programs specially designed for the local-government community are available. These range from short seminars through correspondence courses to graduate and post-graduate programs.

PROGRAMS ASSOCIATED WITH A.M.C.T.O.

One of the most specific, and certainly the most popular, formal learning program for municipal government is the groups of courses that lead to the designation "A.M.C.T." At the moment there are three types of programs accredited by the Association of Municipal Clerks and Treasurers of Ontario that lead to this designation.¹ These programs include a three-year correspondence course offered through Queen's University, a regular day-school program offered through four accredited Colleges of Applied Arts and Technology, and three-term extension (night-school) program offered through accredited colleges.

¹Use of the designation is limited to those who have successfully completed one of these courses and who hold the position of recognized responsibility within either the clerks or treasurers department in an Ontario local government and who are members of the Association.

1. By Correspondence

Beginning in 1958, a three-year correspondence course was offered as the first completely municipally-oriented educational program in Ontario. The course was sponsored by the Association and drawn up through Queen's University, specifically through the Institute of Local Government at Queen's.

The course was intended as an upgrading vehicle for those already practicing within local government. More recently it has become accepted as a general requirement for employment within local government, and particularly within small local governments. A large number of smaller municipalities, when advertising job vacancies for clerk or treasurer, require that applicants be graduates of the course, be enrolled in the course, or be willing to enroll in the course.

Historically, about half those who have begun the first year of the course have successfully completed the first year. In 1973-74, the first-year enrollment was 130 while 67 passed the examinations for the year. Of the 77 enrolled in the second year of the course in 1973-74, 60 completed the course. Of the 74 enrolled in the third year, 68 completed the course.

The course is based on a series of lessons mailed out each fall. Students read each lesson, answering questions contained in the lesson. These questions are marked and the marks go toward the final mark for the year. Each

student must sit a final examination, usually in a university setting. Originally, the final examination accounted for 80% of the final mark, but more recently the final exam has accounted for 60% of the mark with the other 40% coming from term marks given to the individual lessons.

2. Day School at College

Beginning in 1972, the Association began to accredit Colleges of Applied Arts and Technology to offer a municipal-government program of studies leading to the designation "A.M.C.T." The Association required that any college seeking accreditation show that it was teaching all of the materials contained in the correspondence course, that it had sufficient library holdings in the area of local government, and that its instructional staff be suitably knowledgeable in the field of local government.

Colleges accredited to date are St. Lawrence, Seneca, Niagara, and Fanshawe. At least two other colleges, Georgian and Northern, have shown interest in offering a course of study leading to this designation. At the moment only Seneca and Fanshawe still operate day programs, St. Lawrence and Niagara having dropped the courses due to low enrollments.

The college programs normally include three courses that roughly relate to the three years of the correspondence course, along with several others. Each of the colleges requires students to take courses in the areas of business studies, language/communications, political science, accounting/statistics.

3. Extension Courses At Colleges

For the last five years, accredited colleges have been offering a three-term program in the evening leading to the A.M.C.T. designation. Each of the terms equates roughly to one year of the correspondence course. Normally, students will be involved in a two to three hour lecture/seminar each week for ten to fourteen weeks for each term of the program, a total of approximately 100 lecture/seminar hours. Students who began local-government studies through correspondence have been switching to the lecture/seminar format at the colleges to complete their programs. Final examinations are required at the end of each term in some colleges.

Course Materials

All the programs leading to the A.M.C.T. designation must include all of the materials included in the three-year correspondence course. This material was originally compiled years ago and has been updated somewhat since then. There is general agreement that the materials are badly dated.

There have also been suggestions that the material, to a large extent, is no longer relevant. During the interviews conducted as part of this study, individual municipal managers were asked their views of the course. Almost invariably those from large municipalities said the materials

were relevant only to those in small municipalities, while those in smaller municipalities found the materials relevant only to large urban centres. Everyone agreed the course is beneficial--but to someone else.

In a response to these criticisms, the Education Committee of A.M.C.T.O. has established a sub-committee to examine and report on proposals for a new curriculum. The committee has agreed to investigate not only new teaching materials but also methods of delivering the curriculum.

Impact of the Course

The A.M.C.T.O. course has achieved two things. First it has shown that much of the knowledge necessary for a successful career in local government can be gained through formal education; that is, local government is teachable. Second, it has developed as a minimum level of formal knowledge that is acceptable to the local-government community.

There has also been a number of spin-offs from this course. When A.M.C.T.O. accredited colleges to offer its teaching materials it established a community resource for local-government education as opposed to a single correspondence resource. As the course became more available through the colleges, a broader group of people enrolled and the course has moved from a position where it was used mostly by those in the position of clerk or treasurer to a point,

now, where the majority of those taking the course at colleges hold jobs other than clerk or treasurer; in fact, some come from jobs that are mainly clerical or stenographic in nature.

The A.M.C.T. designation originally evolved as the professional qualification for a clerk or treasurer. It developed as the educational requirement not only for admission to the professional community, but as the most important qualification, after experience, for establishing a mobile career within local government. The course has more recently become accepted as the main qualification, after experience, for promotion within some municipal governments. The designation is avidly sought at all job levels as a sort of passport to management, particularly in the medium-sized municipalities.

An informal survey of some recent graduates of the A.M.C.T. group of courses has indicated that people enroll not so much for the sake of the learning that can take place as for the designation itself. This shows a growing demand for some type of formal qualification for local government, and the acceptance of this particular course as the only widely-known existing formal qualification.

A Critique

The A.M.C.T. course materials, as originally designed, were to provide practitioners with a basic knowledge of local government. This objective has been met.

Since the inception of the course, the nature and function of local-government jobs has changed, yet the course itself remains substantially the same.

The course was originally intended for use by clerks and treasurers, yet today is used not only throughout the clerks' and treasurers' departments, but in many other jobs. There has been a smattering of council members enrolling in the course. While it is no longer seen as a clerk/treasurer course but as a local-government course, it deals with little outside of the clerk/treasurer functions.

This study was launched in response to a demand for an examination of management resources in local government. This course offers little in the way of management development.

It is generally recognized that correspondence courses are the least desirable way of acquiring learning. They permit very little in the way of idea exchanges. Discussions with individuals taking the course by correspondence indicate they rely, to a large extent, on notes made by former students and on discussions with former students. There is an obvious need to incorporate seminars or other forms of exchanges in the correspondence course.

This study has shown there are very different requirements placed on managers in large and small municipalities.¹

¹See Organization and the Management Focus, the third in this series of discussion papers.

There are obvious different educational requirements for the different departments and functions within a municipality. This single course does not recognize these variations in need.

At least half the people employed in local-government work in the larger centres, yet an analysis of those enrolled in the correspondence course in 1975-76 shows 74% of those in the first year, 71% of those in the second year, and 55% of those in the third are employed by municipalities with a population of less than 25,000. The majority of those taking the course by correspondence are those with the least opportunity to exchange ideas within their work environment. Although exact figures are not available, it is reasonable to assume that, with college programs available in four of the larger communities (Toronto, Kingston, London, Welland) many of those employed in larger municipalities are taking this course through the lecture/seminar format. These people, then, have available to them not only the teaching environment but also the work environment for idea exchange and stimulation.

The course was originally intended for clerks and treasurers, yet an analysis of students in 1975-76 shows that, of 237 students in all three years, only 131 held the title of clerk, treasurer, or assistant to clerk or treasurer. There were six members of council enrolled and the other 100 students reported 21 different types of jobs covering most departments within local government.

UNIVERSITY COURSES AND PROGRAMS

Only three Ontario universities have developed courses or programs with specific municipal-government management content. Of course, every university that offers courses in public administration or business administration also offers some municipal content, or content that is relevant to municipal government.

The three universities with specific municipal-government orientation are Queen's, which offers a Masters of Public Administration as well as the well-known seminars and courses through its Institute of Local Government; Western, with a program that includes a six-week residential course leading to a diploma for municipal administrators; and Windsor, where a new proposal allows courses taken through professional bodies or associations as credit toward a Bachelor's degree.

Queen's University

The Institute of Local Government at Queen's is the oldest and best-known source for municipal-government studies in Ontario. The Institute has been operating since 1945 under the direction of such well-known figures as K.G. Crawford and T.J. Plunket. The Institute was primarily responsible for producing and drawing together the teaching materials used in the A.M.C.T.O. course.

More recently the Institute has been offering an annual seminar on aspects of municipal management. This year's seminar revolved around the topic of Human Resource Management.

The Institute also prepares a journal, Urban Focus, for wide distribution throughout local-government circles. It is now involved in the preparation of monographs on specific local-government issues. Staff of the Institute carry out research and conduct lectures and seminars both at the university and for municipal groups.

University of Western Ontario

This is the third year in which the Urban/Regional program of the Department of Political Science, has been sponsoring a six-week residential seminar that leads to a diploma for municipal administrators. This program is specifically designed for people already working in municipal government.

Students must live at the university for the six-week seminar, which involves study of local and regional politics, administration and change, and local and regional planning administration. Supplementary courses may be required for individuals depending on previous education and municipal experience.

During its first year of operation the program granted 12 diplomas. An assessment of the program, carried out at the end of the first year by the Advisory Committee of Users, was very positive. Some funding is available through the Ministry of State for Urban Affairs (Ottawa).

University of Windsor

Certificate, diploma and Bachelor's programs in public administration are available through the university. While specific municipal content is limited, as it is in most other universities, advanced standing can be granted for local-government studies that are already complete. The university specifically recognizes community-college diplomas in municipal administration as being transferable, and graduates of the A.M.C.T. correspondence course would also be considered for advanced standing.

University Graduate Programs

Many universities offer graduate (Master's) and post-graduate (Ph.D) studies in the fields of public administration, political science, or business administration. Particularly notable are the programs at Carleton, Queen's, Toronto, Western, and York.

Generally, students must have completed an honours B.A. program, or its equivalent, before entering a graduate program. Much of the formal learning program can take place on a part-time basis in most schools.

PROVINCIAL RESOURCES

Ontario Management Development Program

The Ministry of Colleges and Universities offers a series of management development courses available as packages to Colleges of Applied Arts and Technology. Many of the colleges now offer these courses.

Courses with specific municipal content or specifically applicable to municipal management include:

Business and Management - General

- 71-01 General Management
- 75-08 Municipal Management for Results

Finance

- 63-01 Bookkeeping
- 63-02 Management Accounting
- 74-03 Financial Management
- 76-04 Basic Financial Controls
Computer Concepts for Management

Operations Management

- 72-04 Work Simplification
- 72-06 Job Enrichment for Administration
- 73-09 Purchasing

Supervision and Foremanship

- 73-03 Effective Supervision - Public Administration
- 73-04 Effective Supervision - Human Relations for
the Public Service
- 73-05 Effective Supervision - Communications for
the Public Service
- 73-06 Effective Supervision - Production for Super-
visors in the Public
Service
- 75-01 Effective Supervision - Human Relations
- 75-02 Effective Supervision - Communications
- 75-03 Effective Supervision - Administration

Personnel Management

- 66-02 Personnel
- 73-10 Human Resources Management
- 75-09 Personnel Selection Techniques

Civil Service Commission

A number of courses are offered each year through the Ontario Civil Service Commission. While these courses are specifically designed and selected for their applicability to management within the Provincial Government, they are also often applicable to local government. Some municipal managers have been involved in these courses in the past. Registration is open to municipal managers if courses have not been filled by Provincial civil servants.

OBSERVATIONS

1. Course offerings with a high "municipal" content are found only in Southern Ontario.
2. Public Administration course offerings at universities are aimed more at the federal or provincial levels of government, although in Ontario, as an example, there are more municipal civil servants than provincial civil servants.
3. Although nearly all colleges offer courses that are applicable to local government, only four (Seneca, St. Lawrence, Fanshawe, and Niagara) have packaged and marketed these into a recognizable municipal government program, and those four colleges formed this package based on the requirements for A.M.C.T. accreditation.
4. Existing learning programs offered through professional bodies or associations (e.g., Association of Municipal Clerks and Treasurers) are directed toward specific municipal departments, not municipal government management as a whole.
5. Administration or management courses are now directed almost entirely to the private sector, and those with a public-sector bent are directed toward the federal or provincial levels of government.
6. Municipal governments have not developed, or found the need to develop, policies on the education/training/development of staff.
7. Municipalities have not established budgets for education/training/development of staff.
8. Professional bodies and associations, with one or two exceptions, have done little, beyond organizing conferences, in the way of professional development or little to encouraging members to continue their personal development within the profession or discipline.
9. There is little in the way of management training being carried out even by those professions and associations that have incorporated developmental activities in their programs.

10. There is no organization to foster the development of managers or management. Existing organizations are based on departmental lines (vertical organization) not on levels of hierarchy (horizontal organization).
11. There is no accepted curriculum for municipal management, and little has been done to identify the elements of such a curriculum.
12. Existing education/training programs are based on formal learning situations, and little credit is paid to experience as an equivalent to the formal learning; yet, the local-government community has indicated experience is the major criteria for acceptance into and advancement within the management group.
13. There are no guidelines, beyond such things as accreditation by A.M.C.T., for establishing municipal-management packages at colleges or universities.
14. There is no objective measurement by which individuals, municipalities, or associations can judge the applicability of college or university courses as appropriate to their own demands or desires.
15. There is no objective method by which educational institutions can measure learning acquired on-the-job as equivalent to their formal class-room programs, and little desire on the part of the schools to examine this possibility.
16. Education, training, and development are not separate but interacting and complementary in municipal management, yet no attempt has been made by any agency to recognize them as such.
17. There is a demand for certificates or diplomas from municipal civil servants, particularly in the field of municipal management, yet only Western University has devised diploma program in this field. There are, of course, diplomas at the community college level.

PART THREE

THE APPROACH

The word "future", for the purpose of this study, means the foreseeable future, and in local government the foreseeable future is usually considered to be the next ten years.

Even over this relatively short period of time it is difficult to predict all the developments that will take place and all the capabilities that will be needed to ensure that that expertise is available.

Throughout the data-gathering phase of the study, attempts were made to get municipal managers, academics, and other interested people to specify the capabilities they feel will be needed in the future managers. To a large extent, these attempts were unfruitful. Each person, in each situation, had a different interpretation. It is fair to say that each suggested there would be "more" required, but there was little attempt to measure how much "more", or what the "more" would consist of.

It has also become clear throughout this study that there is no single answer because there is no single style or type of municipal management. In the previous section of this paper, four different "dimensions" of management were identified (see Pages 18 and 19). While these types do not pretend to be totally representative of any single manager, they do appear to represent the broad Province-wide picture of municipal managers.

This examination of future education/training/development needs, then, will be based on the four different dimensions of management identified.

This paper has also identified five general categories of education/training/development that are necessary, in varying degrees, in all types of municipal management. Each of these types will be examined, and each will be broken down into specific learning programs or experiences designed to produce the degree of expertise needed. Since there is a variety of sources for education and training and the types of development programs appropriate and available to the different types of managers, each of these will also be noted.

THE FOUR DIMENSIONS OF MANAGEMENT

It would be impossible to project the education/training/development requirements for each of the 7,000 or so managers within local governments in Ontario. It would even be impossible to project the requirements for specific types of managers (e.g., municipal clerks) because the 835 existing municipal clerks work in 835 different situations with 835 sets of needs. Each person also finds himself in a unique situation when it comes to developing skills or acquiring education because of the availability of courses, seminars, in-house training and other developmental vehicles in his area.

It is possible, however, to examine the question from the standpoint of a few types of positions, and to determine an individual's needs from these "norms".

In an attempt to identify what these types of positions are, both council members and managers were asked to comment on the level of expertise they felt would be needed by individual managers in the five elements of learning and experience identified in the preceding part of this paper--management skills, political awareness, communicative ability, mental energy, technical skills.

These responses indicate that there are four general "dimensions" of management within municipal government as a whole. These "dimensions" are not to be interpreted as steps

on a ladder, each completely separated from all others, but as part of a line, with each of the "dimensions" overlapping other levels.

These types of managers, or dimensions of management are:

1. Management in small municipalities;
2. Junior management in medium-large municipalities;
3. Mid-management in medium-large municipalities; and
4. Senior management in medium-large municipalities.

An examination of the degree of expertise required in each of the five elements, superimposed on the four dimensions of management, results in the chart shown on Page 40.

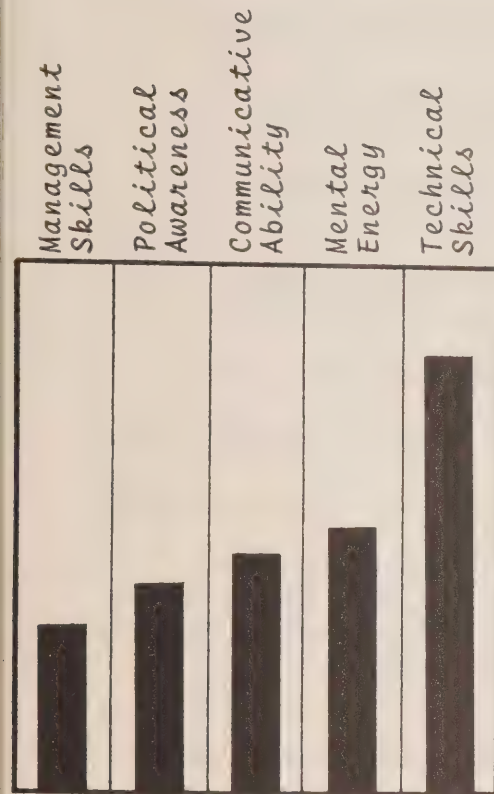
As can readily be seen from this chart, there is no single answer to the question of what course or courses are most appropriate to local government. While managers in all "levels" require expertise in all five elements, they require them to a different degree according to the type and size of the municipality. There will also be variations according to the organization of the municipality; a treasurer in a C.A.O. system will have different responsibilities, and therefore, different needs than a treasurer in a situation where there is no C.A.O.

LOCAL-GOVERNMENT

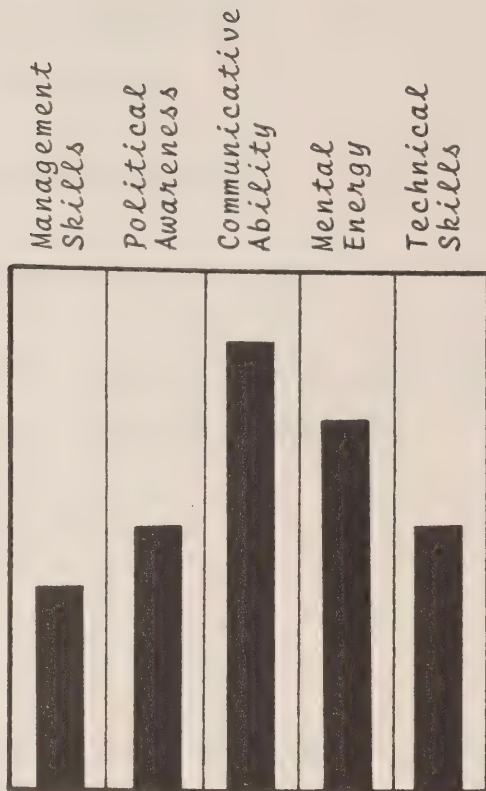
MANAGEMENT:

Expertise Required
In Different Elements
In Different Types
Of Managers

N.B. These diagrams represent a cross-section of management, not necessarily the desirable level of expertise for any specific job.



MANAGEMENT
SMALL MUNICIPALITIES



JUNIOR MANAGEMENT
MEDIUM-LARGE MUNICIPALITIES



MID-MANAGEMENT
MEDIUM-LARGE MUNICIPALITIES



SENIOR MANAGEMENT
MEDIUM-LARGE MUNICIPALITIES



THE FIVE ELEMENTS OF MANAGEMENT

This paper has suggested there are four dimensions of management:

- management in a small municipality;
- junior management in a medium-to-large municipality;
- mid-management in a medium-to-large municipality;
- senior management in a medium-to-large municipality.

The paper has also identified five elements of management common to municipal managers throughout Ontario.

These are:

- management skills;
- political awareness;
- communicative ability;
- mental energy;
- technical skills.

An examination of the chart on Page 40 suggests that of the first three elements--management skills, political awareness, and communicative ability, it is possible to say that any manager will require either a moderate or a high degree of expertise. This could, in turn, be translated into learning programs or other developmental activities. There could be, as an example, a course or courses in management skills and one in advanced management skills. The manager in a small municipality would benefit most from the first of these courses, while managers in large municipalities would require the advanced course.

The chart on Page 40 indicates that there are two levels of expertise--moderate and higher--required in management skills, political awareness and communicative ability. Mental energy is required to a high degree in all management positions.

The fifth learning element, technical skills, is obviously the most diverse and the one in which the most specific information is needed. Technical skills in an engineering department are quite different from technical skills in a finance department. While it is recognized a high degree of expertise is required in technical skills only in managers in small municipalities, it is also obvious from other papers in this series that few people get to become managers in a large municipality without having worked in a junior capacity where these technical skills are much more in demand. While the chief planner of a municipality does more managing (the first four elements) than land-use planning (the technical element), up to now he has had to know the technical aspect in order to become the chief planner.

If there appear to be, perhaps, two "levels" of expertise needed in management skills, political awareness, communicative ability, mental energy, and technical skills, depending on the "dimension" of the job, these "levels" must be identified and their component parts defined. It must be understood that any such listing of components may not apply to a specific job, only to the general types of municipal management job as it has been identified by

this paper. The level of expertise required for any specific job will be determined by the municipality and the individuals within it.

Not all of these elements, or their components, are "teachable". In suggesting education/training/development for managers, some of the activity will be "self-learned", some will be acquired through formal channels, and some will be a combination of these two. There will be, of course, people with "native ability" in some of these elements who, it would appear, will not need to undergo any type of developmental program in those areas.

MANAGEMENT SKILLS

An ability to foresee and forestall problems in the allocation and use of human and other resources, an ability to see the job from the perspective of the entire organization; an ability to translate problems and answers into quantitative terms, an understanding of one's role in planning, organizing, directing and controlling resources; skills in establishing objectives, and monitoring progress toward these objectives, the use of leadership styles consistent with the goals and climate of the organization; an ability to use scarce resources effectively and efficiently.

Nearly every person contacted through this study has argued strongly that a person either is a manager or is not. Some suggested they could spot potential managers on first meeting, and identified people on their staffs with the potential to be good managers.

When individuals were asked what it was that separates potential managers from those without potential, their answers were vague. Most people simply stated that they knew, inherently, whether the potential was there. Additional questions elicited responses such as "he knows how to handle people" or "she really knows how to get things done".

When the managers were asked why these "potential" managers were not part of the management cadre, their responses ranged from "he needs more time to mature and to work off the rough spots" to "there just aren't any jobs available".

Questioned further, the managers said each of the "potential" managers needed some development before entering the management cadre. Specifically, they suggested experience on-the-job and "a course or two". Neither the type of experience nor the type of course was identified, except in rare situations.

There appear to be some difficulties in municipal government's approach to the development of management skills:

- no one can personally develop the skills of management unless the person is able to practice the skills; it is necessary for potential managers to be given management responsibilities in order to hone their native abilities.
- many of the management skills are teachable; they can be learned through seminars, classes and other forms of formal learning, but the student must be able to put these lessons into practice.

- if it is possible to identify potential managers "on sight", it is possible to identify the qualities that give these people potential; if it is possible to say a person needs to mature or have the rough edges smoother, it is possible to identify these edges and develop ways in which they can be smoothed.
- not all managers require the same skills to the same degree. Some functions require more technical and personnel expertise than other functions, where organization techniques, problem-solving skills, and resource allocation may be paramount.

A recipe for the development of management might call for two parts experience, one part formal learning,¹ mixed well, and put in a warm place for two or three years to allow the ingredients to meld and rise. All of this, of course, must take place under the direction of a good "chef" or the result will be less than could be expected.

Those who come into management with experience might require only formal learning. Those who come with formal learning might require only experience. The recipe is simple, but it works, and it does not matter which of the ingredients is added first, as long as it is understood that nothing can happen until both are present and have been thoroughly mixed.

In examining management skills, it is apparent that managers in small municipalities and junior managers in medium-large municipalities will require a basic background,

¹Formal learning can be: courses, seminars, prescribed reading programs, dialogues or information exchange.

while mid-managers and senior managers in medium-large municipalities will require an advanced level of expertise.

The components of these two levels are:

LEVEL I

An ability to foresee and forestall problems in the allocation of resources;

An ability to translate problems and answers into quantitative terms;

An understanding of the role of the job in planning, organizing, directing, and controlling resources and programs;

Skills in establishing objectives and monitoring progress toward these objectives;

An ability to use scarce resources effectively and efficiently.

LEVEL II

Successful demonstration of all the components of Level I, plus:

An ability to foresee and forestall problems in the allocation and use of human resources;

An ability to see the job from the perspective of the entire organization;

The honing of leadership styles consistent with the goals and climate of the organization;

An ability to establish and work with teams to examine specific problems and reach mutual objectives.

POLITICAL AWARENESS

An understanding of the political system; an understanding of the position held by a person within the decision-making process; an ability to work within a bureaucratic structure; an ability to accept and administer decisions made by councils or superiors even if these decisions are not agreed to by the person; an ability to alter priorities according to social and environmental changes; an ability to assume a high profile or a low profile, as the situation demands.

Few people disagree that political awareness is an inherent quality and even fewer suggest that the truly politically-aware person does not also know the workings of the political system.

It is possible to develop political awareness without any formal learning through years of experience and personal involvement. This type of awareness often takes the form of knowing when to push an issue and when not to--that some matters are best discussed during election years and others during "off" years.

It is also possible to learn political awareness in the classroom, through case studies and research or sampling techniques.

Once again, this element of municipal management can be developed either through formal learning or through experience. Once again, it would appear that a combination of these two methods would be best. Formal learning, added to years of experience, might produce a person who not only knew when to introduce a problem or program, but why the time was suitable. Experience added to formal learning would produce an individual who not only knew why certain issues were acceptable or unacceptable, but how to go about introducing the issue.

Managers in small municipalities and junior managers in medium-to-large municipalities appear to need a moderate degree of political awareness while all others require it to a high degree.

LEVEL I

An understanding of the political situation in the municipality;

An understanding of how one's position fits within the local decision-making process;

An ability to work under the direction of councils;

An ability to accept and administer decisions made by councils or superiors even if these decisions are not agreed to personally;

An ability to help alter the municipality's priorities according to social, financial and environmental changes;

An ability to assume a high or low profile as the situation demands.

LEVEL II

All of the components of Level I, plus:

An understanding of different political situations in different types of municipalities and other levels of government;

An ability to work within a bureaucratic structure;

An ability to assess, for each municipal issue, the role that is best played by both council and administration, and to take an active part in establishing mechanisms to co-ordinate the activity of these two groups;

An ability to work with special-interest groups, but to keep overall municipal objectives in the forefront.

COMMUNICATIVE ABILITY

An ability to express one's self clearly and precisely in both speaking and writing; an ability to understand and respond to both written and oral communications.

No person in a management position can possibly survive without well-honed skills in all aspects of communication. It would seem senseless to attempt to identify two "levels" of communication expertise for managers until one examines the functional types of communication being performed by each type of manager. The levels then become quite clear.

Managers of small municipalities and the mid-management group and senior managers of large municipalities do not require writing ability as much as they require reading skills. All levels require oral skills; those working in large municipalities require these skills to a greater extent because of the number of people with whom they communicate on a regular basis.

LEVEL I

The ability to write clear, concise reports; the ability to write quickly enough to take notes verbatim, on occasion; the ability to precis long reports for reading by council members or superiors.

LEVEL II

All of the elements of Level I, plus:

Speed-reading, effective listening, effective public speaking.

MENTAL ENERGY

An ability to examine problems and situations and to apply remedial measures in a way which will correct the deficiencies; an ability to understand and rationalize new techniques and procedures, and to apply those which will improve existing situations; an ability to think in both pragmatic and theoretical terms; a willingness to use untried but likely solutions to problems.

Mental energy cannot be specifically identified with developmental vehicles. An I.Q. test might show what mental power there was, but this could never indicate whether this power could be translated into action.

It is perhaps best to say that while mental energy is a valid element of municipal management, it is impossible to detail the components of this element beyond saying that the individual must be logical, theoretical and pragmatic, all at the same time.

A fairly rough method of determining the degree of mental energy present in an individual is to examine that individual's resume. A person who has moved to jobs of increasing responsibility would likely have more mental energy than a person who has remained on the same job for years. A person with a high level of education likely has more mental energy than a person with a low level of education. A person who has undertaken developmental activities likely has more mental energy than a person who has not. Those who have contributed to professional bodies, associations, community groups, may have more mental energy than those who have not.

TECHNICAL SKILLS

An ability to understand technical functions required by specific departments, such as bookkeeping or accounting, drafting or drawing; data processing or analysis, records processing or retention.

It is a person's technical skills that get him his first job, in the vast majority of situations. This is certainly true in local government.

These technical skills, of course, vary according to the job. A person moving into a treasury department will need accounting or bookkeeping skills. A person getting into an engineering department will likely need drafting. Typing and shorthand are often required in the clerk's department, and so on.

It is also fair to say that the larger the municipality, the more specialized the technical skill will have to be. Planning departments in small municipalities, where much of the functional planning is done by consultants, might require only a general background. A planning department in a large municipality would probably require a much more specialized background, perhaps in transportation or environmental studies.

Most of the departments within a municipality can draw on colleges and universities to provide them with candidates with suitable technical backgrounds. There are programs for planning, engineering, recreation, social services, horticulture, law, accounting, and so on. Where there is not a specific college or university program available, an association or professional body has usually filled the void. A prime example is the A.M.C.T. group of courses already discussed.

FUTURE RESOURCES FOR EDUCATION/ TRAINING/DEVELOPMENT

Very little of what will be needed in the way of education and training for municipal management cannot be provided through existing colleges, universities and professional bodies or associations.

There can be no doubt that the university is best qualified to provide the general education that will be required by management--in the fields of administration, human values, and environmental impact. The universities are also best qualified to handle political science.

The colleges and professional bodies or associations are best equipped to handle the "training" aspect of municipal management. Colleges can offer the day-one skills so necessary in all departments of local government. Professional bodies or associations can provide, through their own developmental wings, the specific discipline skills that are required on a continuing basis. A well-rounded program for potential municipal managers would likely involve a formal program at a university, backed with one or two college courses to provide the day-one skills, and followed up with participation in a learning program, perhaps attached to a professional body or association.

This same education and training program would, of course, involve the individual being given the responsibilities to apply his learning to the job and a planned

movement between departments within the municipality, or between municipalities.

There is little that will be needed that is not already being offered somewhere within the province. All the predictable learning is already available, although the programs are widely scattered across the province. All the developmental activities that are predictable are being practiced whether in Ontario or in other Canadian jurisdictions.

The missing factor is that there is no co-ordination of these activities. There has been little in the way of identifying what activities are available at what centres, or what developmental routines have been proven in what municipalities.

While existing college and university programs are, for the most part, not geared toward municipal government, they could easily become municipally oriented by providing these institutions with municipal-government literature--the case studies and text books that are simply not available now. These institutions have indicated overwhelmingly that they would develop specific municipal management courses or programs once they know what content is most appropriate to attracting a clientele. The clientele is willing, once it knows that the courses are appropriate to local government.

Professional bodies and associations have shown a willingness to become involved in specific training,

usually through seminars or workshops during regular meetings, but have not been able to determine what content is most appropriate, or what resources can be called on to provide the teaching aspect of the workshops.

All of these quandries could be overcome through a consolidation of the efforts of educational institutions and practitioners, along with either the establishment of a central body to assist in this co-ordination or the province assuming responsibility for carrying out such a function.

The requirements can be outlined. The resources can be made available. The co-ordination seems to be all that is lacking.

PART FOUR

METHODS OF CO-ORDINATING EDUCATION/TRAINING/DEVELOPMENT

It is clear that, at least for education and training, there is not so much a need for new programs as there is for a method of co-ordinating existing efforts, and assisting existing agencies in developing new materials.

It is also clear that a number of such methods have been established in other provinces and nations, and that the experiences of these agencies might provide valuable clues to co-ordination of the Ontario effort.

This series of discussion papers has shown a need for co-ordination of education, training, and development. Not all of the agencies and systems to be examined in this section of the paper deal with all three matters; in fact, some touch only one. It is also recognized that the situations which led to the creation of these agencies or systems may vary widely from the existing Ontario situation. None of these examples is proposed as a solution to the Ontario situation. Such a proposed solution will be developed as a result of discussion with Ontario municipal officials over the next three months. The examples are used here merely to show that solutions can be developed.

N.B. To a great extent, the materials included here have been drawn from the publications of the Municipal Management Development program, sponsored by the Institute of Public Administration of Canada, The Association of Municipal Administrators, and the Federation of Canadian Municipalities. Walter Tuohy is the author of these publications.

THE CANADIAN EXPERIENCE

Nearly every province within Canada has become involved in the question of education and training for municipal government management. These efforts range from the establishment of agencies in the Maritimes and Quebec to internal programs within specific cities.

QUEBEC

In 1969, Ecole Nationale D'Administration Publique (E.N.A.P.) was formed in Quebec to assume responsibilities for education, training and development of public service and para-public service administrators within the Province. Five centres were then established, dealing with areas such as education, social services, public administration and, most recently, municipal administration.

Le centre de perfectionnement des administrateurs du secteur des Affaires municipales was established in early 1975 in collaboration with the Department of Municipal Affairs, with responsibility for identifying municipal administrative needs, forming a policy and programs for training and development, and contributing in an overall fashion to improve professional competence among municipal administrators.

An assessors program (le programme de perfectionnement en evaluation fonciere) is presently underway, and is being

made available to persons employed by municipal or private organizations and engaged in the assessment field. The program is attempting to improve the competence of these persons, whether they have received prior professional training or not, and to assist in the integration of practical knowledge within a systematic theoretical framework.

Another area of program activities is looking to the concerns of municipal management, and includes four topics: the administrative process; the management of human resources; the management of material resources; and the management of financial resources. The City of Quebec has undertaken this program, bringing together its City Manager with sixteen senior management persons. Eight sessions are held under each of the topic areas, with a resource person supplied by E.N.A.P. Other cities have indicated interest in the program.

The Centre also performs an advisory function for municipal organizations to assist in the analysis of training and development needs, as well as the design, implementation, and evaluation of training and development activities.

The Montreal Urban Community has established its own training and development facility, and E.N.A.P. confines its municipal activities to areas outside Greater Montreal.

BRITISH COLUMBIA

The British Columbia Municipal Administration Education Council, representing three levels of government, and the B.C. Municipal Officers Association, received an Interim Report on the B.C. Municipal Management Needs Development Programme at its 30 April, 1976, meeting. This report was adopted by the Council; however, its implementation is subject to endorsement generally by the member bodies of the Council.

The report recommends:

1. That a "career ladder" concept of education in municipal administration be endorsed.
2. That certain criteria be used in devising a career education program in municipal administration.
3. That such a career education program have as its basic elements the following:
 - a) A vocational study course to be provided for suitable candidates of any age seeking to prepare themselves to enter the municipal service.
 - b) A full-time orientation course of three or four days for persons newly appointed at any level who have no municipal experience and have not taken the Vocational Course.
 - c) A mainstream formal program leading to qualification for a B.C. Municipal Administration Certificate, concurrently with the acquisition of a professional designation (if such a designation is not already held), administered by the British Columbia Institute of Technology on a province-wide basis. This would employ a variety of delivery systems to enable the same course content to be available in all geographical locations. The co-operation of a university willing to

provide Continuing Education beyond the Certificate would be sought at appropriate stages of this recommended certificate course.

- d) A continuing education program beyond the B.C. Municipal Administration Certificate program, administered by a British Columbia University, and providing for the external acquisition of a Diploma in Public Administration. Planning should also commence for a Master in Public Administration program to be available to holders of the Dipl. P.A. It is an essential part of these proposals that previous university graduation not be required for entrance to these courses if previous certificates and professional qualifications and experiences are held.
 - e) Short-term intensive workshops for municipal officers of limited experience and holding positions in small towns.
 - f) An internship program for university graduates, embarked upon experimentally with caution.
 - g) Exchanges of officials between municipalities on a limited and selected basis, also experimentally.
- 4. That a career counselling service be provided, available to all municipal staff in the Province.
 - 5. That in-service training programs be expanded and integrated with the career education program.
 - 6. That serious consideration be given to the organization of a central information service on matters of municipal administration.
 - 7. That a "mentor" system of interest and guidance by senior municipal officials be instituted for those following the career education program at a lower level.
 - 8. That an intensive program of public relations and recruitment be embarked upon as soon as possible to engender interest in the municipal service as a career.

10. That a British Columbia Institute of Local Government be formed on a permanent basis to continue and implement the work already carried out by the British Columbia Municipal Administration Education Council. The Institute would consist of representatives of the Municipal Officers Association of B.C., the Union of B.C. Municipalities, the Department of Municipal Affairs of B.C., and the Board of Examiners constituted under The Municipal Act. It would also have power to co-opt representatives from institutions of learning or the professions.
11. That a program be instituted leading to a closer liaison between the various bodies of municipal officials in B.C.

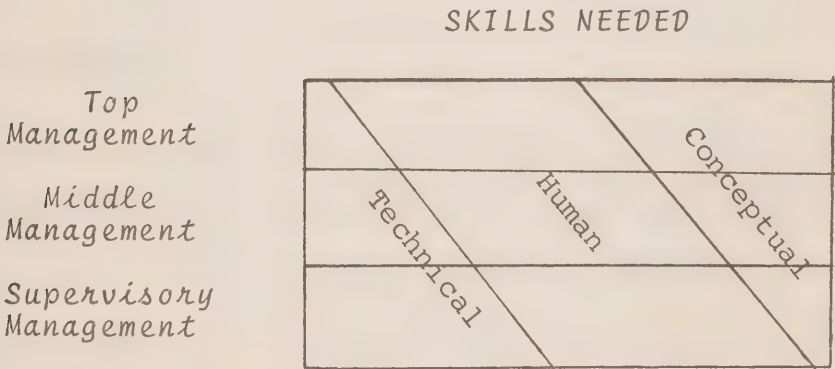
ALBERTA: CITY OF CALGARY

The policy of the City of Calgary regarding responsibility for management development states that managers at all organizational levels in the City shall have responsibility and accountability for the control, utilization, and development of employees under their individual jurisdictions.

The policy statement encompasses some 500 management exempt employees of which approximately 100 are in positions requiring real management knowledge, abilities and skills, or deserving of the title "manager". A secondary group comprises pre-supervisory and supervisory employees (approximately 500) who are on the "threshold" of management. Therefore, some 1,000 employees comprise in the broadest sense the management pool of the City, at the apex of which are approximately 100 "manager" positions.

The management development program efforts are determined from a sub-system of "needs determinants" comprising: a basic, computerized manpower inventory; continuity planning; a forecast of development requirements for all management/exempt officers by line managers; interviews with senior management on identified "high priority" areas; provision of specific individual counselling to officers; and a pilot program based on the management "Assessment Centre" concept to help officers in defining their personal needs more closely through selected test batteries (not intelligence) and related management exercises.

In determining the content of management development programs, a systematic determination of the skills required at the three basic levels of management (lower, middle, upper) as developed by Professor Robert Katz has provided a useful explanatory framework:



At the highest level of management conceptual skill (the ability to see the enterprise as a whole, including the organizational interdependencies, how changes in one affect

all the others, including the visualization of the organization and its interface with the community, and the potential social and economic forces as a whole) will be required.

At the lowest level (first line supervisor and foreman), technical skills are of prime importance. These are defined as an understanding of, and proficiency in, a specific kind of activity, particularly one involving methods, processes, procedures or techniques.

The City has utilized such resources as: the International Personnel Management Association; the American Society of Training and Development; the National Training and Development Services; Scientific Methods Incorporated; the Leadership Institute of Spokane; the Universities of Alberta and Calgary; Southern Alberta Institute of Technology; Mount Royal College, Calgary; and others.

THE MARITIMES

The Maritimes Municipal Training and Development Board was established by the Council of Maritime Premiers in October, 1974, to meet the needs for education, training and development of municipal government officers throughout the three Maritime Provinces.

The Board has established a pilot training program in Prince Edward Island, through Holland College; circulates a "job letter" in which municipal vacancies are listed; and has been instrumental in developing an inter-municipal staff exchange pilot program.

The Board has also commissioned a major study of education and training needs within the Maritime Provinces.

Recommendations from the second phase of this study include:

1. ... that the MMTDB, in consultation with professional associations, educational institutions, and provincial departments of municipal affairs develop a "model set of personnel policies and procedures" for use by municipal governments in the Maritime Provinces, and provide assistance to individual units in adapting these to the needs of differing size, scale and range of service responsibilities.
2. ... that the MMTDB in the development of a model set of personnel policies give strong and specific emphasis to measures such as commitment to the merit principle and internal promotion to further the concept of a municipal administration career service.
3. ... that the MMTDB, in consultation with professional associations, provincial departments and educational institutions, foster the development of a basic program in municipal management which would meet the specific training needs in this field as identified through the survey. The design and delivery should be carried out in a way that will make use of existing resources.
4. ... that the MMTDB maintain on-going liaison with professional associations, provincial departments, and educational institutions, in order to integrate the present offerings of courses, workshops, and seminars to encourage participation by personnel from departments and agencies involved in related service areas; and to ensure that resources are co-ordinated in the development and delivery of new programs to meet needs that are similar for each of the Maritime Provinces.

5. ... that the MMTDB inform professional associations, educational institutions, and provincial departments involved in the delivery of in-service programs for municipal administrators of the barriers perceived by department heads and urge them to review and where necessary modify their policies regarding the scheduling and timing of courses and related matters.
6. ... that the MMTDB, in consultation with professional associations, educational institutions and departments of municipal affairs, prepare and distribute to municipalities on a regular basis a catalogue of existing courses and programs in both the general areas of management and administration and the professional areas relating to the service responsibilities of municipal government.
7. ... that the MMTDB urge that evaluation processes, where they do not already exist, be built into the design of all in-service programs which are presently being attended by municipal administrators, and that the results of these evaluations be widely distributed to municipal administrators and used in the design of future programs.
8. ... that the MMTDB identify selected in-service training programs to be evaluated which are presently not being utilized by municipal personnel but which hold promise as a source of municipal in-service education. Such identification and evaluation should be carried out in consultation with professional associations and educational institutions with the results to be distributed to municipal administrators as an aid in the selection of courses which are appropriate to their training needs.
9. ... that the MMTDB, in consultation with professional associations, educational institutions and provincial departments of municipal affairs, undertake the development of guidelines for performance of the training function; the development of the appropriate methods for the assignment of the responsibility to a designated member of staff; and the development of the necessary programs to equip administrators with the skills to effectively execute the function.

10. ... that the MMTDB continue and expand as one of its major responsibilities, the identification of funding needs, and the provision of funds to meet those needs as they relate to regional training and development programs.

DEVELOPMENTS IN ONTARIO

In the past two years, a number of specific education and training developments have taken place within Ontario. A number of these, such as the six-week course at Western University and the new programs at the University of Windsor have already been mentioned.

There have been a number of developments in non-academic circles as well, including a study of continuing education for municipal engineers, a recommendation from the Professional Association of Municipalities of Ontario, and the establishment of the Advisory Committee on Local-Government Management.

This latter committee has also prepared a paper with education and training recommendations. The full text of the Committee's paper is included as Appendix "A" to this paper.

Municipal Engineers

A study of continuing education for municipal engineers, conducted on behalf of the Municipal Engineers' Association by Lionel D. Feldman Consulting Ltd. and Urban Design Consultants resulted in a number of recommendations dealing with courses and seminars in management for municipal engineers. The study was completed in 1975.

As a result of these recommendations a number of proposals for implementation have been put before the Association. These include:

"... that the following two types of courses, (A) and (B)¹ should be instituted as soon as the necessary arrangements can be made:

- (A) A Certificate or Diploma Course in Public Administration as a credit towards an M.P.A. Degree

The main features of such a course would be as follows:

1. It would be given on a short-run, intensive basis and would probably consist of a sufficient number of one or two-week courses given fairly frequently over, say, a two-year period to make up the credits needed for the qualification being sought.
2. The course would be offered at a university centrally located in the Province. The M.E.A. would initially design the course content in consultation with the university and would subsequently maintain a watching brief on the operation of the course to ensure that the content was being maintained. The M.E.A. would not, however, be responsible for the day-to-day running of the course since this could be adequately carried out by the university staff.
3. The course would contain some topics related particularly to Public Works administration but the majority of the course content would relate to municipal administration generally. Assistance would be sought from such organizations as A.P.W.A. and I.C.M.A. in designing the course content."

¹The second course proposal relates to an M.A.Sc. degree in Public Works Engineering, and is more related to the profession of engineering than to management.

Professional Associations of
Municipalities of Ontario

The Liaison Committee of the Professional Associations of the Municipalities of Ontario (PAMO) two years ago proposed the creation of an Institute of Local Government that would have education and training responsibilities for local government.

PAMO is represented on the Advisory Committee on Local Government Management, and much of PAMO's activity in the field of municipal management development has been directed toward this committee.

In March of this year, in response to the ACLGM paper already cited, PAMO requested its constituent associations to respond to certain mechanisms that have been suggested to assist in the development of local government management:

1. An Institute of Local Government Management, an autonomous agency to aid in the development of local government management in general;
2. An "in-service" training program for university graduates;
3. A career assessment and planning centre, to guide persons seeking professional designation in municipal management;
4. A central recruitment reference agency to facilitate contact between job seekers and potential employers; and
5. A central secretariat for associations of municipal officials (now being investigated by PAMO).

THE UNITED STATES EXPERIENCE

While it has been possible to report on the majority of developments in Canada, the number of programs available in the United States makes it necessary to mention only the best-known and most-utilized developmental vehicles. No attempt has been made to list the vast number of specific college and university programs.

THE INTERNATIONAL CITY MANAGEMENT ASSOCIATION

The International City Management Association is a professional and educational association of appointed administrators in cities, counties and councils of governments. Most of I.C.M.A.'s 7,000 individual members are local-government professionals in the United States, Canada, Europe, and other countries. Membership from Canada at the present time includes: Nova Scotia (1), New Brunswick (6), Quebec (77), Ontario (34), Manitoba (1), Saskatchewan (3), Alberta (2), and British Columbia (12).

The Association provides a wide range of services, programs and publications for its members, including such things as monthly newsletters, bulletins, Public Management magazine, a job-placement program for minority executives, eligibility for a deferred compensation retirement program, eligibility for group-life and accidental death and disability insurance, eligibility for the I.C.M.A. Academy for

Professional Development and directories for the profession (Directory of Recognized Local Government, Directory of Members, Directory of Municipal Management Assistants).

In addition, I.C.M.A. makes available to local-government professionals publications and training designed to enhance local-government services. These include: Management Information Service, with monthly reports to local officials and an inquiry service; books in the Municipal Management Series; Urban Data Service, with monthly reports analysing data for and about municipal government; the Municipal Year Book and County Year Book; and the Institute for Training in Municipal Administration, with correspondence training courses for municipal management.

THE ACADEMY FOR PROFESSIONAL DEVELOPMENT (I.C.M.A.)

Of increasing interest to I.C.M.A. members, both in the U.S. and Canada, has been the recent (1974) creation of an Academy for Professional Development. The Academy was set up to assist members in establishing individually-tailored programs by which they can pursue an orderly pattern of career development. It was designed to be a basis for the improvement of the profession as well, and it is invisioned that the Academy will become the major arm of I.C.M.A. in relating to universities and post-entry training programs.

More specifically, the Academy's objectives are to assist members in planning a personal growth program, to establish guidelines for members to follow in developing as professionals, to assess the effectiveness of education and training opportunities, and to recognize members who achieve their own professional growth.

Membership in the Academy is based on an individual's filing a plan of professional development and having the plan approved by the Academy Board. The Academy Board stresses assistance to members in determining their own needs rather than limiting them to a rigid set of requirements. An individual becomes an associate member of the Academy upon the acceptance of the plan which he files, and becomes a full member upon completion of the plan and approval by the Board. A member remains so for a period of five years, and to renew membership the individual must file a new professional development plan for an additional five years. A life membership is awarded once the membership has been renewed three times.

Planning is an integral part of local government and regional organizations. Planning is commonly used in budgeting, land use, capital facilities, health care, and transportation. Few managers are not directly involved in some process of planning in their city, county, or council of governments.

Yet the professional development of most urban administrators is unplanned, ad hoc, hit-and-miss. Few of us are exceptions. How frequently have you attended a special conference, talked about a subject, taken a course, or read a book because these items were readily available and seemed worthwhile?

The results of unplanned professional growth--just like unplanned land use--are fairly predictable. The results are missed opportunities, wasted effort, unsatisfactory growth, and unachieved but vaguely understood goals.

(O.C.M.A. Handbook for Professional Development Planning)

A seven-step procedure is outlined for the manager who wishes to join the Academy:

- Conduct an inventory of your professional qualities and life goals;
- Engage in a process of consultation with others on your qualities as a professional local-government administrator;
- Specifically identify your strengths and needs as a manager;
- Establish goals for your professional development;
- Build a strategy for meeting the goals;
- Write a brief biographical sketch;
- Assemble an application from the results of steps one through six.

The third step is designed to help create a complete and specific description of managerial qualities, and to help the manager establish priorities. It is based upon a list of potential strengths and needs, and is subdivided into three areas: 1) knowledge of management systems and techniques, 2) skills in interpersonal relations, and 3) knowledge of factors external to local-government management. A fourth area, program expertise, is also listed. It is adapted from a more comprehensive list developed by the

National Association of Schools of Public Administration and Affairs. (The N.A.S.P.A.A. list was developed in order to identify fully what N.A.S.P.A.A. considered the universe of potential competencies that should be acquired by a student of public administration. It is used by public administration schools in evaluating their own curricula).

Each of the four lists is structured so that the manager may check relative weights after each topic (very strong, strong, adequate, somewhat weak, need substantial improvement, not important) and gain a clear picture of his strengths and needs.

The lists are not perceived as exhaustive in any sense but, rather, indicate those areas which have been identified through experience as more significant. Full opportunity is left to the individual to list additional strengths and/or weaknesses, and to have these additions be given full consideration by the Academy Board in processing his application for membership.

LIST I

Knowledge of Management Concepts And Techniques

- Systems Analysis
- Productivity Improvement
- Program Budgeting
- Economic Forecasting
- Federal Forecasting
- Federal Grantsmanship
- Legal Research and Procedures
- Other

LIST II

Skills in Interpersonal Relations

- Communicating with the Public
- Group Leadership
- Working with Elected Officials
- State and Federal Lobbying
- Labour Negotiation
- Citizen Participation
- Organizational Development
- Motivation
- Coping with Stress and Change
- Supervisory Practices
- Other

LIST III

Knowledge of Factors External to
Local-Government Management

- Social Patterns, Mores and Forces
- Management Practices in Other Countries
- Political Systems Analysis
- Economics, Political and Social Philosophy
- History
- Psychology
- Communications Theory
- Frontiers of Technology
- Other

LIST IV

Program Expertise and Specialization

- Community Development
- Criminal Justice
- Business Regulation
- Educational Administration
- Environmental Management
- Finance and Budgeting
- Manpower and Employment
- Personnel Systems
- Civil Rights and Civil Liberties
- Land-Use Planning
- Public Health and Welfare
- Public Works
- Transportation
- Growth Management
- Tax Policies and Practices
- Leisure Services
- Human Service Delivery
- Solid Waste Systems
- Other

Strategy for Professional Development

For admission to the Academy, the I.C.M.A. Executive Board has created a set of "Standards for Admission". These standards are based on a credit system which recognizes professional service and participation, and also personal and professional development (including education and training). The Academy Board annually publishes a booklet of specific credits for specific activities and training and educational programs. The criteria for such credits are based on actual case determinations of known training programs and professional activities of Corporate Members of I.C.M.A.

The credit system (units) was established to assist the individual in balancing his development plan. The plan must be constructed so that a total of fifty units is earned over a five-year period, and that a minimum of twenty-five units be earned in each of the two general categories. (The system of units is based upon the rule of thumb that, for each eight-hour day of professional development activity, an individual earns one unit).

CATEGORY A: PROFESSIONAL SERVICE AND PARTICIPATION

1. Professional Organization Services (Maximum 15 Units)

This includes participation in such activities as the annual conference of a national or state professional organization, service on a committee or task force and service as an officer of a national or state association (1 to 3 units each).

2. Attendance at Professional Association
Conferences
(Maximum 7 Units)

(1 unit each)

3. Helping Others to Learn
(Maximum 6 Units)

This includes such activities as teaching an academic course, conducting a civic program in high school, participating in a visitation program to universities, and leading a seminar or other training program (1 to 3 units each).

4. Participation in Regional, State, or
Federal Government Activities
(Maximum 6 Units)

This includes serving on a committee of a regional organization and testifying or serving on an advisory board of a regional, state, or the federal government (1 to 3 units each).

5. Authorship of a Report, Book Review, or
Article Related to Local Government
(Maximum 6 Units)

Each item authored does not necessarily have to be published. A report that is useful to local government would qualify if made available through a professional association on a loan basis (2 units each).

CATEGORY B: PERSONAL AND PROFESSIONAL DEVELOPMENT

This category consists of recognized training and development programs. A total of twenty-five units must be earned in training both in general administration and management skills and in personal and interpersonal growth and development programs. Of the twenty-five units, a minimum of five must be earned in each group.

1. General Administrative Management Skills
(Maximum 20 Units)

This includes such areas as organization, decision-making, and functional management problems (police, public works, etc.).

2. Personal and Interpersonal Skills
(Maximum 20 Units)

This includes such areas as sensitivity training, transactional analysis and the management grid.

Category A activities stem from the "strengths" of the manager, while Category B activities are determined by "needs". Both sets of activities, with relative weights and priorities, have previously been identified by the manager under Step 3: "Identifying Strengths and Needs as a Manager".

Professionalism and Local Government

When the I.C.M.A Task Force on the Local Government Career Service recommended in 1971 that I.C.M.A. organize and systematize its professional development efforts through the establishment of an Academy of Professional Development, it was clear that traditional criteria for "professionalization" could not be met fully. Management may be viewed as an art as much as it is a science, and the body of knowledge required is extremely difficult to identify, let alone quantify. There is no way to establish an acceptable body to administer testing and to impose what would amount to "certification" for thousands of city councils who employ managers and impose their own requirements. The Academy, however, assists in promoting higher educational standards, technical competence and continuing career development through the unique plan outlined above.

THE BRITISH EXPERIENCE

In Britain a number of local-government education and training activities are in place, and are functioning well. These include the Local Government Training Board, Local Authorities Management Services and Computer Committee, Institute of Local Government at Birmingham, "sandwich" courses at colleges, and training programs offered by professional associations.

Local Government Training Board

In 1967, the various local-government associations, in conjunction with the Greater London Council and trade unions, established the Local Government Training Board. The prime objective of this board was to increase the efficiency of local government by ensuring that sufficient training of the right quality was given to staff and employees of local-government units at all levels.

Activities of the LGTB to date include:

- preparation of training material;
- the provision of training to individual local authorities, by the running of experimental courses, sometimes in conjunction with provincial council's training officers and sometimes through the educational system;

N.B. Information on British activities has been drawn from work compiled by Dr. George Betts, Institute of Local Government, Queen's University, during a research program in 1976.

- sponsoring of special courses at institutions of higher learning (e.g., general management and personnel);
- liaison with many bodies involved in education and training for local government;
- co-operation in training matters with central government departments, particularly training services agencies.

The Board has assumed as a prime responsibility the preparation of training materials. In 1974-75, a new series of teaching materials related to and derived from local government was developed. The Board discovered that, as in Canada, available case studies were related to the private sector, with some available for the senior level of government. Materials already published by the Board include cases relating to the problems of manpower planning and staff development; and three volumes of studies that have proved useful as discussion documents about interpersonal relationships of both managers and supervisors.

The aim of the management training documents was to enable local government as a whole to get the best out of the many facilities available in the wide range of teaching institutions. These documents also made it possible for the educational institutions to work with the Board and local authorities in mounting those courses and programs that local government needed. This plan has been an outstanding success and co-operation between the universities (particularly INLOGOV at Birmingham) and the Board appears highly satisfactory.

The Board also is responsible for conducting examinations in courses controlled by the Board, particularly the Diploma in Municipal Administration, and those for which the Board acts as an agent for other groups such as the fire and police services.

The Board has established an on-going research program that assists in providing valuable information for local authorities in training activities. This research is undertaken largely by the educational institutions, with much of it being conducted by INLOGOV, Birmingham, and the Institute of Urban Studies, Bristol.

The Board has also established a publications program that includes training recommendations, training material, annual reports, draft schemes, bulletins and training newsletters.

Local Authority Management Services And Computer Committee (LAMSAC)

When computers first entered the local-government scene, the need became apparent for some central office that would eliminate duplication and the waste of time that would be involved in each municipality conducting its own computer research. The local-government computer committee that was formed in 1967 soon expanded its scope to include all management service techniques.

The committee's objectives are:

- to advise constituent bodies on major matters of policy affecting local government, generally, as a result of the development of management sciences and the use of all management services;

- to collect and disseminate among members information on management sciences, including essential data covering all aspects of management services;
- to plan training courses, study groups and conferences to meet local-government needs for a wider understanding and use of management sciences and to assist local authorities individually and in groups to organize their own courses;
- to maintain contact with government departments, specialist bodies and universities concerned with management sciences;
- to initiate and co-ordinate further research with management sciences likely to benefit local government.

LAMSAC operates from a central office in London, with regional offices that provide the initial means of contact with local authorities. Since Britain has recently undergone a major reorganization of local government, much of the activity of LAMSAC has been involved with requests for assistance as a result of reorganization.

Institute of Local Government (INLOGOV)

A notable feature of local-government education in Britain is the degree of university participation. INLOGOV predominates. It has a staff of 40 providing a variety of courses of a high level, tailored to meet the needs of municipal managers, and also offers courses leading to post-graduate degrees and diplomas in local government. There are seminars for chief officers ranging from one to five days; two and three-week courses on such topics as corporate planning for practitioners, inter-governmental

relations; courses for specific professional groups within local government; special research projects on behalf of local authorities, such as a current study of budgetary processes in 27 local authorities over a series of four cycles.

OTHER EUROPEAN EXPERIENCES

At a 1976 symposium on training for urban management sponsored by the Technical Co-operation Service of the Organization for Economic Co-operation and Development, representatives of a number of nations gathered to hear theme papers, examine case studies, and develop recommendations for urban management training that could apply throughout their member nations. It is interesting to note that Clive Chalkely of Calgary presented one of the case studies.¹

Among the papers presented were those on:

- the scope of urban management and the needs and objectives of training (United Kingdom);
- the process of training for urban management (United Kingdom);
- experiences with training elected representatives (Finland, Denmark, United States of America);
- the use of management by objectives as a catalyst for training (Germany, France, Canada);
- experiences with evaluation of training (Ireland, Australia, United Kingdom);
- urban planning for senior planners and administrators (Switzerland, Spain, Sweden);
- further developments for training in urban management.

¹A discussion of the Calgary experience is found on Page 60 of this paper.

There was really only one common conclusion reached by the participants: that there is no preconceived formula for all training programmes in all countries. Granted that overriding consideration--that each urban trainer must operate within his own governmental and political context--the group made some recommendations which should improve training for urban management.

RECOMMENDATIONS

"Target" of Training

- the principal focus of training for urban management should be the professional personnel and elected officials of local government.
- In a broader sense, training--or at least exposure to the issues facing urban management--should be extended to those outside local government whose sphere of influence and activity interface with the management of urban area.
- Subjects relating to urban management should be included in the general education system at the secondary school level; also urban management issues could be exposed to the wider population by better use of the communications media.
- There should be more training--perhaps called leadership development--available for elected officials with emphasis on policy issues.

Methodology

- Urban management training must continually adapt to the ever-changing and complex issues facing the urban managers. Thus, it should make use of innovative training methods as well as a variety of such methods.

- The combined training of senior professional staff and elected representatives should be encouraged; this is another way to foster rapport between the two groups and bridge the gap between policy development and implementation.

Curriculum Content

- Training curricula should be determined by the needs of the local government and also be linked to research activities which serve local government.
- Curriculum should include training local-government officials to identify their own training (professional development) and research needs.

Institutional Characteristics

- Training should be available both internally, within the local-government structure, and externally, through special training institutions.
- If feasible, there should be more than one training institution in a country. They should have close links to local and/or national government, but maintain a high degree of autonomy and academic freedom.
- The training institution staff should be made up of both professional trainers and urban government officials on temporary assignment; they should also be a multi-disciplinary team, since the complex issues facing urban managers cut across sectoral lines.

PART FIVE

WHAT NEEDS TO BE DONE?

Each of the previous discussion papers in this series-- Manpower Planning, Career Planning, Organization and the Management Focus, and Recruitment--have been concluded by either general recommendations or a list of questions that should be examined.

Each of these four discussion papers has dealt with subject matter that is relatively new to local-government circles, and where little in the way of consensus or strong feeling has been developed.

The fifth discussion paper is somewhat different. The matters touched on have been, to a large extent, widely debated within the local-government community and many recommendations and suggestions have been made over the past few years. Education and training activities are already being widely offered, and have been widely accepted throughout local government. Developmental activities have been widely discussed and, to an extent, are being introduced into the practice of local-government management.

The purpose of these discussion papers is not to present the ready-made solutions of any individual or agency; the papers are intended to bring important questions (issues) into sharper focus and to determine what support there is within local government and elsewhere for concrete action to resolve these questions. Local government's need for managers

has been projected before this and thoughtful recommendations for action have been offered, but without sufficient evidence of local-government support many of these recommendations have been ignored. If this study is not to meet the same fate, the local-government community must show that it is deeply concerned about the issues, supports specific actions to tackle these issues, and commits itself to participate in positive programs of action.

As these discussion papers have been produced over the last six months, a number of positive statements and recommendations for action have been received from the community. Many of these revolve around similar issues, and, taken together, result in the following 18 points.

1. There is an immediate need for a concerted effort to provide a new program for the education, training, and development of municipal managers. The question is not whether such an effort should be made, but how soon it can be made and what form it should take.
2. There is no doubt that no existing local-government body or agency is in a position to undertake this concerted effort, although there are signs that these agencies and organizations may form a common front on this issue. The difficulty is that the problem is immediate and any common front by the agencies and associations would take a considerable period of time to reach fruition.

3. Educational institutions have exhibited a high degree of interest, and have even made tentative commitments to initiating or expanding their offerings in the field of local government, and particularly in local-government management, but they are, to a large extent, unsure of the demands that will be placed on them by the practitioners.
4. Practitioners are ready now to support new education and training activity for their individual disciplines and for local government as a whole.
5. Management of local government is not so far removed from management of provincial or federal governments, or from private industry, that the educational offerings available in these fields could not be quickly tailored to respond more positively to local government.
6. There is a dearth of local-government literature--case studies, examples, texts--and there is no existing local-government agency or association with the facilities or funds to sponsor the development of this literature.

7. Training activities are, for the most part, being handled now by the disciplines or professions within local government--most notably by the Association of Municipal Clerks and Treasurers and the Society of Directors of Municipal Recreation of Ontario. Both of these groups are now examining new processes by which their training activities can be updated and made more responsive to the needs of their memberships. These two associations represent only a small portion of the total municipal government employment. All other associations or groups offer next to nothing in the way of professional or discipline training, and have shown few signs of incorporating this type of training into their activities.
8. Developmental activities to produce better managers simply cannot be handled by single municipalities, with a few exceptions, yet there is no vehicle available to assist in such development. It is inconceivable that the best possible manager will have experience in only one municipality or in a single department within a municipality, yet movement from one discipline to another is very difficult, and there are many barriers to movement from one municipality to another.
9. There will be rather substantial sums of money required to provide the ultimate answer to education, training, and development of local-government managers. There is also a variety of methods by which these funds could be made available.

If each local government contributed ten cents per capita, over \$800,000 would be available in any given year. Yet the larger municipalities might find they could use this same amount of money more propitiously for internal education, training, and development, and small municipalities might feel they would not benefit from any developmental programs. The likelihood of a per capita levy, at this time, is highly improbable. A second source would be the provincial government, yet the Province would feel its responsibilities lie with the entire local government community, not specific elements of it, and there is no existing voice to speak for and act on behalf of the whole community.

10. The most pressing problem is to develop a common voice within the local government community to handle questions pertaining to education, training and development.
11. This common voice should quickly develop and promote a municipal management curriculum, proposals for specific training, and proposals for intermunicipal, interdisciplinary development of individuals.
12. This common voice should assume responsibility for the educational aspect of local government management, and work closely with colleges, universities, and private sources to provide a comprehensive, readily

available program of learning that will be beneficial to local government as a whole and to the individuals who work within local government. The suggestions found in Part III of this paper might form the basis of such a program.

13. This common voice must have sufficient funds available to promote the drafting of new local government literature, and to develop methods for getting this literature into the local government community. It may take a form as simple as "the case study of the month club".
14. This common voice must develop an immediate rapport with the existing professional bodies and associations, and assist these groups in instituting or improving training programs; it should accept a training responsibility if the appropriate professional bodies or associations do not respond.
15. This common voice should immediately investigate the value of "designations" or "certification" or "registration" as distinct from learning and developmental programs tailored to fit the individual.
16. This common voice must develop a career guidance system, perhaps through the use of mentors chosen from senior practitioners, to assist individuals in selecting the most appropriate learning programs and developmental courses.

17. This common voice must immediately develop a mechanism, such as a "job letter", to insure that all municipal managers are aware of all job openings across the province in an effort to promote mobility of ideas and practices; to assist individuals in developing career paths; and to assist councils in having the widest possible range of candidates for a particular job.

18. This common voice must move quickly toward identifying those local government matters that are common throughout the province, and develop strategies to assist managers in handling these problems.

APPENDIX A

PROPOSALS FOR
LOCAL GOVERNMENT MANAGEMENT DEVELOPMENT
IN THE
PROVINCE OF ONTARIO

A MEMORANDUM PREPARED BY
THE ADVISORY COMMITTEE ON
LOCAL GOVERNMENT MANAGEMENT

21 JANUARY 1977

The purpose of this paper is to provide a perspective on the need for a development programme in local government management and to set out some proposals which the Advisory Committee on Local Government believes would go a considerable distance in meeting this need. This matter of the development of local government management is dealt with in this paper under three headings as follows:

- The Need for Local Government Managers;
- The Elements of Local Government Management Development; and,
- The Committee's Proposals for Action.

The Need for Local Government Managers

For some considerable time now there has been developing a growing awareness and a sense of concern about the needs of local government for management personnel. Expressions of this awareness can be found in an increasing number of reports published both in Ontario and other provinces, statements and talks by local officials, both elected and appointed, discussions at meetings of municipal associations and associations of officials, articles by educators and informed citizens.¹

The need for local government management is generally dealt with in both quantitative and qualitative terms. In quantitative terms

1. Illustrative of these in Ontario are the following: Education for Urban Management, Canadian Council on Urban and Regional Research, Ottawa, 1970; A Study of Continuing Education for Municipal Engineers: Phase 1 - A General Study of Attitudes and Preferences, September 1974 and Phase 2 - Guidelines for Action, October 1975, both reports prepared for the Municipal Engineers Association of Ontario by Lionel D. Feldman Consulting Ltd. and Urban Design Consultants; Managers for Local Government, Reports Nos. 1, 2 and 3 and Discussion Paper No. 1, published by the Advisory Services Branch, Ministry of Treasury, Economics and Intergovernmental Affairs, Toronto, 1976. Reports produced in other provinces include the following: B.C. Municipal Management Development Needs Programme, Final Report, July 1976, prepared for the B.C. Municipal Administration Council by Holloway/Schulz & Associates Ltd., of Vancouver, B.C.; Education for Urban Management prepared for the Ministry of State for Urban Affairs by the Association of Planning Programmes at Canadian Universities, August 1973; Management Resource Needs of Urban

the perceived need is to ensure a continued supply of individuals capable of undertaking existing management positions in local government. (Local government management can be defined as including not only city managers or chief administrative officers but also the heads and deputy heads of functional departments, senior staff positions and a number of posts including substantial administrative and professional responsibilities.)

While local government in the past never exhibited any conscious sense of career development, nevertheless it was able to attract capable individuals to its employ by virtue of such features as the general security of tenure and the fringe benefits offered which were not always available in employment in the private sector. However, in recent years these benefits have now become more widely available in other areas of employment, in both the public and private sectors. Quite frequently promising managers in local government have been attracted elsewhere with the result that many local governments are now experiencing difficulty in filling management vacancies caused by the normal process of attrition. As a result many such vacancies are filled by attracting personnel from other local governments with the promise of either a better salary or a greater challenge or both.

If the need for local government management could be confined solely to a matter of meeting the demand in quantitative terms, i.e., filling existing vacancies, it might be met in a relatively simple and direct way, particularly if it could be assumed that the position

1 (cont'd.)

Governments in Canada by James H.A. Wallin, Urban Administration Research Group, University of British Columbia, April 1974; Survey of Administrative Personnel in the Maritime Provinces: Phase 1, a report prepared by the Institute of Public Affairs, Dalhousie University for the Maritime Municipal Training and Development Board, Council of Maritime Premiers, July 1976; and, Municipal Management Development, Program Report, July 1976, sponsored by the Institute of Public Administration of Canada, the Canadian Association of Municipal Administrators and the Federation of Canadian Municipalities.

requirements, in terms of professional or technical qualifications, remained stable. But these do not and have not. And this adds a qualitative dimension to the need for local government management. The simple fact is that tasks of local government are becoming increasingly complex and this adds a range of new requirements to the role of the local government manager or administrator. In a report summarizing a series of regional seminars held across Canada in 1970 it was observed that

. . . local government is becoming, and will continue to become, an increasingly important and complex level of government. The rapid urbanization of the country, with the resultant increased demand for basic services, and the increasing involvement of municipal governments in new, and often socially-oriented programs (such as urban renewal), many of which involve interaction with the senior levels of government, have greatly increased the complexity of municipal activity, and with it, the complexity of the role of the municipal administrator whose duty it is to oversee the daily operations of the municipality. Other factors, such as the emergence of local interest groups and the increasing emphasis on the social, as well as the economic implications of activities, has further served to complicate the job of the municipal administrator.

Arising out of these new factors and conditions of municipal government and administration, the need for more highly trained and adaptable municipal administrators was readily recognized and accepted, if present and future anticipated social trends are to be handled in a satisfactory manner.

That is, at all of the meetings, there was general acceptance of the notion that both present and future administrators must be flexible enough to meet and adapt to the ever increasing demands placed on their positions, and to do so in a unique, open atmosphere (i.e. council meetings, etc.) unlike that of his counterparts in business and at the senior levels of government. ¹

More recently a report issued by the Advisory Services Branch of the Ministry of Treasury, Economics and Intergovernmental Affairs reaffirmed this conception of the changing role of local government managers in even more specific terms. ² Even more recently the Advisory Services Branch, in a discussion paper, has provided a clear quantitative measure of the scale of the need for local government managers now developing

1. Eduation for Urban Management. Canadian Council for Urban and Regional Research, Ottawa, 1970. p.21.

2. Managers for Local Government. Report 1: The Issues.

and which will continue to develop over the next ten years.¹ This paper also confirmed, to some extent, the changing nature of local government management.²

There can be little doubt that there exists a real need for managers for local government and the extent of this need has been amply documented by the Advisory Services Branch of T.E.I.G.A. and supported by similar studies elsewhere. Moreover, this need has both quantitative and qualitative dimensions. The matters that now need further elaboration are the elements considered necessary in an effort to secure the development of local government management to meet this need.

The Elements of Local Government Management Development

Any consideration of the development of management in local government must take into account the effects of urbanization. What this means is that not all local governments have the same requirements in this area. A distinction must therefore be made between the needs of urban local governments and those with very small populations and rural municipalities. Urbanization in Ontario has had an effect on the structure, role and complexity of urban local governments, and as a consequence, their needs in terms of local government management are of a different order and a different kind than rural or semi-rural local

1. Managers for Local Government. Discussion Paper No. 1. Manpower Planning. Fall 1976.

2. The discussion paper provided some indication of new types of management positions that are expected to develop in local government. It might be added that the data provided are on the conservative side. Survey from large municipalities were limited and forecasts had to be estimated by use of a weighting factor which would seem to be extremely conservative. For example, it is estimated (p.2) that municipal employment in Ontario totalled 70,500 in 1976 and that half of these (p.3) are employed in larger municipalities, i.e. with populations over 50,000. Data gathered from another source indicates total municipal employment in Ontario is somewhat higher and that the larger municipalities account for more than two-thirds of total employment. See Appendix A to this paper.

governments. This is not to suggest that the latter are not affected by any concern for management. However, their concern has a different dimension.

Viewed from the perspective of the process of urbanization, certain trends can be discerned with respect to local government management and administration in urban communities, among which are the following:

1. emergence of more complex administrative structures and procedures than were formerly considered necessary;
2. recognition of the need for more effective methods to direct, control and maintain the responsiveness of administrative structures which increase continually in terms of size and complexity;
3. increased awareness of the need for information development and analysis as an aid to more effective decision-making; and,
4. emergence of an increasingly complicated provincial-local relationship with respect to the delivery of services, the allocation of financial resources, and the establishment of local priorities, all of which have an impact on the quality required of local government management.

Allied to these emerging trends is the question of the application of new technology and managerial innovation. In terms of new technology, for example, few local governments, other than the smallest ones, have been able to avoid the utilization of the computer although its potential may not yet have been fully exploited in such areas as planning, engineering and forecasting. Associated with advances in technology are new approaches to management. These have arisen from the needs of complex organizations in terms of providing more effective methods of direction, control and utilization of resources. Involved are new techniques relative to budgeting, employee motivation, measurement of performance, establishment of objectives, organizational development, to name but a few.

While developments in technological and managerial innovation cannot be considered universally applicable to local government, these may have relevance in varying degrees. As a consequence, modern local government managers and administrators need to acquire at least an understanding of the extent of their applicability, or inapplicability, to the organizational units for which they have a major responsibility for directing.

Another important consideration of local government management and administration is the need to comprehend the changing role of local government as the result of urbanization. Traditionally concerned with the provision of a limited range of local services many municipalities now find that they must confront "quality of urban life issues" relative to such controversial matters as transportation, pollution control, public housing, development control, redevelopment, etc., and this has led to the rise of active and increasingly vocal citizen groups which seek, in varying ways, to influence the local decision-making process.

From the foregoing it can be concluded that urbanization, technological and managerial innovation and the changing role of local government have combined to alter the style, nature and concept of the requirements for effective local government management and administration. Thus, the focus of programmes aimed at the development of local government management for the present and the future will likely be in the form of aiding managers and potential managers to:

1. comprehend and respond to the requirements of the evolving role of local government brought about by the advance of urbanization and the increasingly complex local relationships with senior governments;
2. make optimum use of available resources, both human and financial, through the utilization, where applicable, of new technological and managerial methodology;
3. create a climate in local government administration that encourages innovation, identifies individuals with management potential and enhances the possibility of young people finding a stimulating career in local government management; and,
4. assist their elected councils in the development of policy and programme proposals and in the establishment of an information base to aid decision-making.

Throughout this paper the term "local government management development" has been used deliberately. It is meant to convey a concern for a comprehensive process of management development that is not limited solely to formal educational programmes, although these are an important element. In this sense the development of local

government management exhibits a two-fold concern with the following:

- the provision of opportunities for those individuals already in the employ of local governments to further develop their potential for the assumption of increased managerial responsibility through, for example, varied work experiences, in-service training, participation in formal educational programmes or a combination of all of these; and,
- the regular recruitment of capable graduates of post-secondary educational institutions and their subsequent effective deployment in challenging work situations where their potential can be developed over time.

If local government is to meet the need for managers both now and in the future there has to be a concern for the conscious development of those already in the employ of local governments. But that is not sufficient by itself. For the longer term there is the need to recruit a sufficient number each year who can, with subsequent experience, move to mid-level positions vacated by those who move into the ranks of senior management. In other words, the two-fold concern outlined above can be viewed as a total process involving recruitment, development and upward movement. It is a continuous process for the normal attrition rate is constantly providing vacancies which demand movement. Moreover, this total process implies the need for a sense of conscious career development, something that has not been a conspicuous aspect of local government management until quite recently.

The foregoing process is applicable to urban local governments and its future development involves the following specific elements:

1. the provision of experiential opportunities within local governments whereby those already identified as having managerial potential can be assured of opportunities for further development and new entrants can gain meaningful experience;
2. the development of continuing education programmes and the provision of released time for these to be pursued;
3. the development of formal educational programmes with some emphasis on local government management in post-secondary educational institutions and with some assurance that those who undertake such programmes will be welcomed by local governments; and,

4. the development of an adequate literature on Canadian local government based on research and documentation of the processes and problems of urban local government, all of which is essential for the undertaking of both the continuing and formal educational programmes indicated above.

The foregoing has emphasized the needs of urban local government for the reason that some three-quarters of the population of Ontario now reside in urban municipalities. (See Appendix B.) However, the requirements of small municipalities and rural local governments cannot and should not be overlooked. Their needs are of a very different order. In such municipalities the management problem is confined to a very small office and often focusses on a single position such as clerk-treasurer. But the responsibilities involved often go beyond the statutory description of the duties of clerk and treasurer. Generally speaking, the incumbents of such positions are literally required to be municipal generalists with some knowledge of a variety of activities, and in most cases they must operate with a minimum of staff assistance. What is clearly required for individuals aspiring to such positions is the development of an appropriate continuing education programme which might include the following elements:

1. secretarial methodology, e.g., preparation of minutes, communications, etc.;
2. principles of municipal accounting (assuming that individuals undertaking the course already have a knowledge of basic accounting);
3. office management practice applicable to a small office; and,
4. local government principles, e.g., role of local government, relevant legislation, powers of corporation, etc.

In the light of the elements of local government management development outlined in this section it is now essential to set out what the Advisory Committee considers to be a necessary programme of action.

The Committee's Proposals for Action

The awareness of the need for a local government management development programme has been demonstrated by the studies contributed by, for example, the Municipal Engineers Association of Ontario and the current review of its educational programmes being undertaken by the Association of Municipal Clerks and Treasurers of Ontario. In addition, the Liaison Committee of the Professional Associations of the Municipalities of Ontario have called attention to the need for a comprehensive and coordinated approach to the matter of local government management development which would "include specific programmes devoted to the following:

- a) persons entering the municipal service;
- b) mid-career training."¹

This Committee has also, in a companion document, suggested the need for an Institute of Urban Studies for Ontario which, in the area of local government management development, would be responsible for "consultation with the appropriate ministers, the Municipal Liaison Committee, the provincial and national staff associations . . . the universities and community colleges, and any other affected agencies."² The extent of the developing need for local government managers in Ontario has been documented in the studies undertaken by the Advisory Services Branch of the Ministry of Treasury, Economics and Intergovernmental Affairs under the general title, Managers for Local Government.³

Underlying the growing awareness of need as illustrated by the foregoing is the apparent desire for some mechanism or agency which could stimulate and coordinate educational and other efforts in local government

1. See The Current Position of Education for Municipal Administration in Ontario.

2. An Agency for the Co-ordination of Education in Municipal Management in Ontario, January 1974.

3. See Report No. 1: The Issues; Report No. 2: The Design; Report No. 3: The Data Base; and Discussion Paper No. 1: Manpower Planning.

management development in Ontario. While continued discussion of and dialogue about this matter is both necessary and desirable it is the Committee's belief that the time has now arrived to consider concrete proposals for action, if efforts in this area are not to become fragmented or undertaken in piecemeal fashion. Moreover, it has to be recognized that initiation of some of the essential elements of an effective local government management development programme cannot easily be undertaken by individual municipalities or by municipal associations that generally have insufficient resources for these purposes.

As a consequence, the Committee proposes that the Province of Ontario undertake an important facilitating role in securing the establishment of a comprehensive local government management development programme, the principal elements of which would include the following:

- (a) the identification of the educational needs for local government management development, the assessment of existing educational offerings, the identification of those courses and offerings which meet the educational needs of local government and those areas where such needs are not being met, the encouragement of educational institutions to develop courses and programmes to respond to identified unmet needs and to improve existing courses and programmes where necessary;
- (b) the development of continuing education programmes in local government management to meet the needs of those already employed in local government management and with due regard for the different needs of urban and rural, and large and small, municipalities;
- (c) the stimulation, encouragement and the provision of incentives where necessary to ensure that individuals already in the employ of municipalities can obtain the released time necessary for participation in educational programmes related to local government management development;
- (d) the encouragement of internship programmes for students whose career objectives are directed toward local government and to this end the development of opportunities in local governments whereby such students can
 - secure a period of employment on an "internship" basis in a local government under conditions mutually determined by the local government and the educational institution; and,
 - obtain, upon graduation, employment in a local government where, during a probationary period they can demonstrate their suitability and capability for permanent employment;
- (e) the stimulation of research and publication on the part of educational and other institutions to provide the materials and

teaching resources required for the development of educational programmes in local government management development; and,

- (f) the provision of financial incentives to local governments and post-secondary educational institutions where necessary to facilitate their participation in (b), (c), (d) and (e) above.

A comprehensive local government management development programme would require:

- (a) a reasonably clear delineation of the purpose of the programme;
- (b) the establishment of criteria relative to the principal programme elements;
- (c) the provision of a total appropriation for the programme with an indication that it would be maintained at an indicated level for a period of at least four to five years; and,
- (d) the requirement where necessary that local governments would have to furnish some part of the cost of certain programme elements.

In putting forward the foregoing proposal the Committee does not intend that the Province should meet the total cost of local government management development in Ontario. The purpose of such a programme, as the Committee envisages it, would be to provide the needed leadership to stimulate participation and more importantly to underwrite some of the necessary development costs. As the Committee comprehends the current situation the awareness of the need exists and its dimensions have already been documented. What is now being awaited by both managerial spokesmen and the interested educational institutions and associations is the mechanism and the "seed" money to get action underway. This can best be achieved, in the view of the Committee, by the initiative of the Province through the Ministry of Treasury, Economics and Intergovernmental Affairs in approving the kind of programme indicated above, and facilitating the establishment of the institutional and financial framework necessary to secure its implementation. Such a programme would also provide a cohesive framework within which local governments, professional associations and interested educational institutions could put forward proposals which require assistance to achieve their development. Proposals would, of course, be evaluated within the terms of reference and the criteria established for principal programme elements.

In addition to the provision of "seed" money by the Province to initiate and stimulate the development of the proposed programme, it will be necessary to provide for its ongoing costs and these should be shared by the municipalities and the Province. Equally important is the need to establish the kind of institutional arrangements which will permit Ontario's local governments and the provincial government to participate jointly in programme development and implementation. While the kind of programme envisaged will require provincial participation and support in the initial years the ultimate objective would be for the local governments of Ontario to assume responsibility for its ongoing management.

In terms of institutional arrangements for the programme what appears to be clearly needed is a body which, for the purposes of illustration, will be referred to as "Ontario Local Government Management Development Council". Such a Council should be representative of and supported by the various local government associations now in existence. As has been indicated many of these have helped to stimulate awareness of the need for educational and development activities in local government management and some have been able to initiate programmes of a very limited nature. Others have suggested programmes of various kinds but have not been able to obtain the resources necessary to initiate much less sustain them. Not one of the existing organizations can by itself undertake the task indicated. Moreover, there is a real danger that if each existing organization attempts to proceed, even in a limited way, there may well be considerable duplication of effort. Equally important is the fact that educational institutions will experience difficulty in attempting to respond to a variety of requests for specific programmes, each of which may only have slight variations.

The purpose of the proposed Council would be to bring together the collective interests and resources of Ontario's local government associations to deal with education and development activities relative to local government management. In this endeavour the Province of Ontario, through T.E.I.G.A., would be a principal partner along with representatives of the various municipal associations. Such a Council could define more specifically the elements considered necessary to secure the general programme outlined above. It would also act as a coordinating and accrediting body for both local governments and educational institutions with respect to activities and undertakings relevant to local government

management development. And it could play an important role in stimulation, development and coordination together with the securing of a broad base of local government support. The Council would not need to undertake specific projects directly but would provide incentives where necessary for local governments to participate and enter into arrangements with post-secondary and other educational institutions for the development of educational programmes considered essential. In terms of staff the proposed Council would need only a very small secretariat.

In concluding this document the Committee must again emphasize the urgency of dealing with the problem outlined and the proposal for its resolution. These should therefore be accorded the highest priority on the agenda of the Province and the interested municipal associations.

* * * * *

LOCAL GOVERNMENT EMPLOYMENT AND PAYROLLS
IN ONTARIO - 1975¹

Municipalities 50,000 pop. and over	Municipalities 10,000-50,000 population	Municipalities under 10,000 population and rural mun.	Total - All Municipalities
<u> </u>	<u> </u>	<u> </u>	<u> </u>

1. EMPLOYMENT

<u>No. Employees</u>	73,284	13,092	20,074	106,550
<u>% of Total</u>	68.8	12.4	18.8	100.0

2. GROSS PAYROLLS²

<u>Gross Payrolls</u>	\$830,527,000	\$120,774,000	\$153,862,000	\$1,105,162,000
<u>% of Total</u>	75.2	10.9	13.9	100.0

3. AVERAGE GROSS PAYROLL COSTS PER EMPLOYEE

\$11,334	\$9,225	\$7,665	\$10,372
----------	---------	---------	----------

- Source: Local Government Employment, Statistics Canada, Ottawa, 1975. Catalogue 72-009 Quarterly. Totals were derived by adding the monthly totals of employment and payrolls and averaging these for the 12-month period. Employment statistics include those employed in the general services of municipalities, metropolitan corporations and counties in Ontario. General services include: (a) departmental services such as police, fire, public works, sanitation, welfare, administration, health, waterworks, etc., and (b) special activities such as librarians, arenas, exhibitions, etc. NOT INCLUDED are employees of municipal enterprises, e.g., transportation systems, electric light and power, telephone, etc., municipally owned hospitals, school boards and joint boards and commissions.
- Gross Payrolls represent all monies paid to employees during the year, before any deductions for income tax, etc. Retroactive and overtime payments are included.

MUNICIPALITIES IN ONTARIO BY POPULATION SIZE GROUPS¹1901-1971Population
Size Groups190119311951196119711. Number of Municipalities² in Population Size Groups

10,000- 25,000	6	23	21	31	38
25,000- 50,000	1	5	11	11	18
50,000-100,000	1	3	6	9	12
100,000-200,000	-	2	2	4	6
200,000 +	<u>1</u>	<u>1</u>	<u>3</u>	<u>5</u>	<u>8</u>
<u>TOTAL</u>	<u>9</u>	<u>34</u>	<u>43</u>	<u>60</u>	<u>82</u>

2. Total Population in Each Population Size Group

10,000- 25,000	80,913	390,238	318,178	508,038	587,175
25,000- 50,000	37,976	175,690	397,542	403,031	630,134
50,000-100,000	52,634	208,572	469,526	642,662	842,039
100,000-200,000	-	282,419	230,308	621,966	738,092
200,000 +	<u>208,040</u>	<u>631,207</u>	<u>1,086,120</u>	<u>1,701,849</u>	<u>2,871,968</u>
<u>TOTAL</u>	<u>379,563</u>	<u>1,688,126</u>	<u>2,501,674</u>	<u>3,877,576</u>	<u>5,669,408</u>

3. Percentage of Total Population of Province in Each Size Group

10,000- 25,000	3.7	11.4	6.9	8.1	7.6
25,000- 50,000	1.7	5.1	8.6	6.5	8.2
50,000-100,000	2.4	6.1	10.2	10.3	10.9
100,000-200,000	-	8.2	5.0	10.0	9.6
200,000 +	<u>9.5</u>	<u>18.4</u>	<u>23.6</u>	<u>27.3</u>	<u>37.3</u>
<u>TOTAL</u>	<u>17.4</u>	<u>49.2</u>	<u>54.4</u>	<u>62.2</u>	<u>73.6</u>

1. Source: Census of Canada for the years indicated and Urban Population Growth and Municipal Organization. Reference Paper No. 1. Institute of Local Government, Queen's University, Kingston. February 1973.
2. Second-tier municipalities, i.e., regional governments and counties, are not included to avoid duplication of population count.

